2011

MINISTRY OF HEALTH

B4 School Check Information System

User Manual

MINISTRY OF HEALTH

Before School Check User Manual

Wellington
29-04-2011

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Purpose

This document provides user instructions for the Before School Information System. Detailed user instructions are provided, along with quick reference guides (Appendix B).

History of this document

In December 2008, the Ministry of Health released the last version of the user training manual for the B4SC programme, and evolved it into this user manual from September 2009.

Version Control

Document	Author	Description	Date
Version 1.0	Karin Zentveld Marlti Chhiba	Reformat and Update Content for a Final User Manual. Incorporating the updates released in September. Content moved to different sections, TOC, Cross Referencing and Hyperlinks to Headings and text added.	April 2011

Data Security Warning

All B4SC Information System users must complete a 'Authorised User Agreement' prior to be given access. This can be obtained and authorised by your local B4 School Check Coordinator. http://www.moh.govt.nz/moh.nsf/indexmh/childhealth-b4schoolcheck-contacts

The B4SC Information System contains and provides data about young children in New Zealand along with their personal demographics and clinical information.

It is your responsibility to ensure that appropriate measures are implemented to protect that information from misuse.

If you suspect that any information has been used for purposes outside of the privacy policy, please alert the Ministry of Health immediately.

1 B4 SCHOOL CHECK PROGRAMME

1.1 Purpose

The purpose of this manual is to instruct B4 School Check Coordinators, Providers and Administration on the use of the B4 School Check system in relation to capturing the results of the B4 School Check.

1.2 B4 School Check (B4SC)

For detailed information regarding the content of the B4SC please refer to the document "B4 School Check: A handbook for practitioners".

http://www.moh.govt.nz/moh.nsf/indexmh/b4-school-check-handbook-mar2010

This handbook is a guide for the B4 School Check providers in the provision of the B4 School Check programme.

Additional information can be obtained online at:

- Ministry of Health's main B4 School Check page: www.moh.govt.nz/b4schoolcheck
- Local B4 School Checks Contacts
- http://www.moh.govt.nz/moh.nsf/indexmh/childhealth-b4schoolcheck-contacts
- Information for the health sector: http://www.moh.govt.nz/moh.nsf/indexmh/childhealth-b4schoolcheck-healthsector
- B4 School Check QuickPlace site http://www2.moh.govt.nz/b4schools (A site for B4 School Check providers – a user name and password is required).

2 B4SC INFORMATION SYSTEM (B4SC IS)

2.1 B4SC IS Overview

The B4SC Information System (B4SC IS) captures and stores data relating to the child, permission, checks (growth, hearing, vision, development and assessments), and any issues identified and referrals made.

The overall purpose of the B4SC IS is to track improved health outcomes from the B4SC. The system records any identified health, developmental or behavioural issues that may adversely affect the child's ability to learn in the school environment, and any referrals/follow up required to improve child health and education outcomes and reduce inequalities.

The system's capture and storage of data relating to the child and the B4SC is a lawful purpose connected with Ministry, DHB and their agents' functions of improving individual and population health. The creation of a reliable source of B4SC information history for each child at a local and regional level across NZ, available to authorised health professionals, will assist in tracking improved health outcomes and reduced inequalities.

The Objectives of the B4SC Information System are to:

1. Accurately record and retain all B4SC results
2. Provide B4SC information to assist with the recall and follow up of individuals by health providers at the local and district level
3. Provide information to providers that an individual has declined a B4SC and that follow up is not required
4. Provide a readily available, accurate history for each child to approved health providers
5. Provide accurate local, district and national B4SC coverage data by age, ethnicity and deprivation level
6. Identify populations which are not accessing the B4SC so that services and resources can be targeted to assist those people to access the B4SC, and thus improve coverage
7. Provide accurate information so providers may evaluate/audit their services, and
8. Provide an information base to improve programme policy and the delivery of services.

The benefit of the B4SC IS for a parent/guardian is that information is portable. Service providers consulted with throughout NZ, about their child's health, can access that child's information as appropriate.

B4SC services are delivered by a range of providers working together. Benefits of the B4SC IS to a provider include the ability to access data other service providers have generated, and track and respond to frequent movements of a child if necessary.

DHBs and their agents will have access to the information for their population. They can analyse and monitor data about their population to inform their planning and delivery of the B4SC service.

2.2 Privacy Obligations for Users of the B4SC IS

The collection, exchange and management of health information about identifiable individuals held on the B4SC Information System falls within the provisions of the Health Act 1956, the Privacy Act 1993 and the Health Information Privacy Code 1994 (HIPC). The HIPC and Privacy Act 1993 can be accessed from the Privacy Commissioner's website (www.privacy.org.nz).

The HIPC provides a broad framework of controls for the management of information about identifiable individuals, which is briefly summarised here as a guide to users' information privacy obligations when delivering the B4SC.

The B4SC Privacy Policy provides further details on the use, disclosure and retention of information collected as part of the B4SC (Ministry of Health 2010). For a copy of the Privacy Policy go to www.moh.govt.nz/moh.nsf/indexmh/policy-b4school-check-information-system-users

2.3 Users of the System and their Roles

The B4SC system user types and their roles are summarised below. Refer to the "user and system administration" section for further details of access to system functionality.

User Type	Description
National Coordinator	Has a national overview of the B4SC process, and liases with various B4SC Coordinators to facilitate the B4SC process.
B4SC Coordinator	Operate at a DHB regional level and facilitate the B4SC process (deal directly with provider organisations within the DHB regions). **Coordinators are responsible for, and able to:** • Assign children to providers • View all children who have turned four years old in their region, and search for children nationwide • View the status of B4SC in their region • View demographic details in the Child's Information screen • Enter consent details, B4SC results, and referral outcomes into the system
Lead Provider	May be responsible for coordinating the B4SCs for their organisation. **Providers can:** • Assign children to providers within their organisation • Return children to the B4SC Coordinator • View the status of B4SCs allocated to them • Perform the check and record the results of the B4SCs allocated to them
Provider	Performs the B4SCs in their provider organisation. **Providers can:** • Return children to the B4SC Coordinator • View the status of B4SCs allocated to them • Perform the check and record the results of the B4SCs allocated to them.
Vision and Hearing Technician (VHT)	Vision and Hearing Providers **VHT can:** • Note consent for the VHT component, if Consent has not already been noted by the overall provider • Perform the Hearing and Vision check and record the results into the B4SC system for the child checked

For further information on Users of the System see User types and roles on Page 88.

System Administration User Types

User type	Description
Central Administrator	Within the B4SC IS, maintain details of system users nationwide.
Local Administrator	Within the B4SC IS, maintain details of system users at their DHB (and provider organisations if required).

2.4 B4SC Process Overview

The B4SC process is supported by the B4SC IS, and comprises three stages:

1. Allocate children and schedule the checks

- Child source data is entered quarterly into the B4SC IS before a child is four.
- Children are allocated to a DHB based on the child's address.
- DHB's/Providers can then allocate to the respective provider to undertake the check.

2. Providers conduct the checks

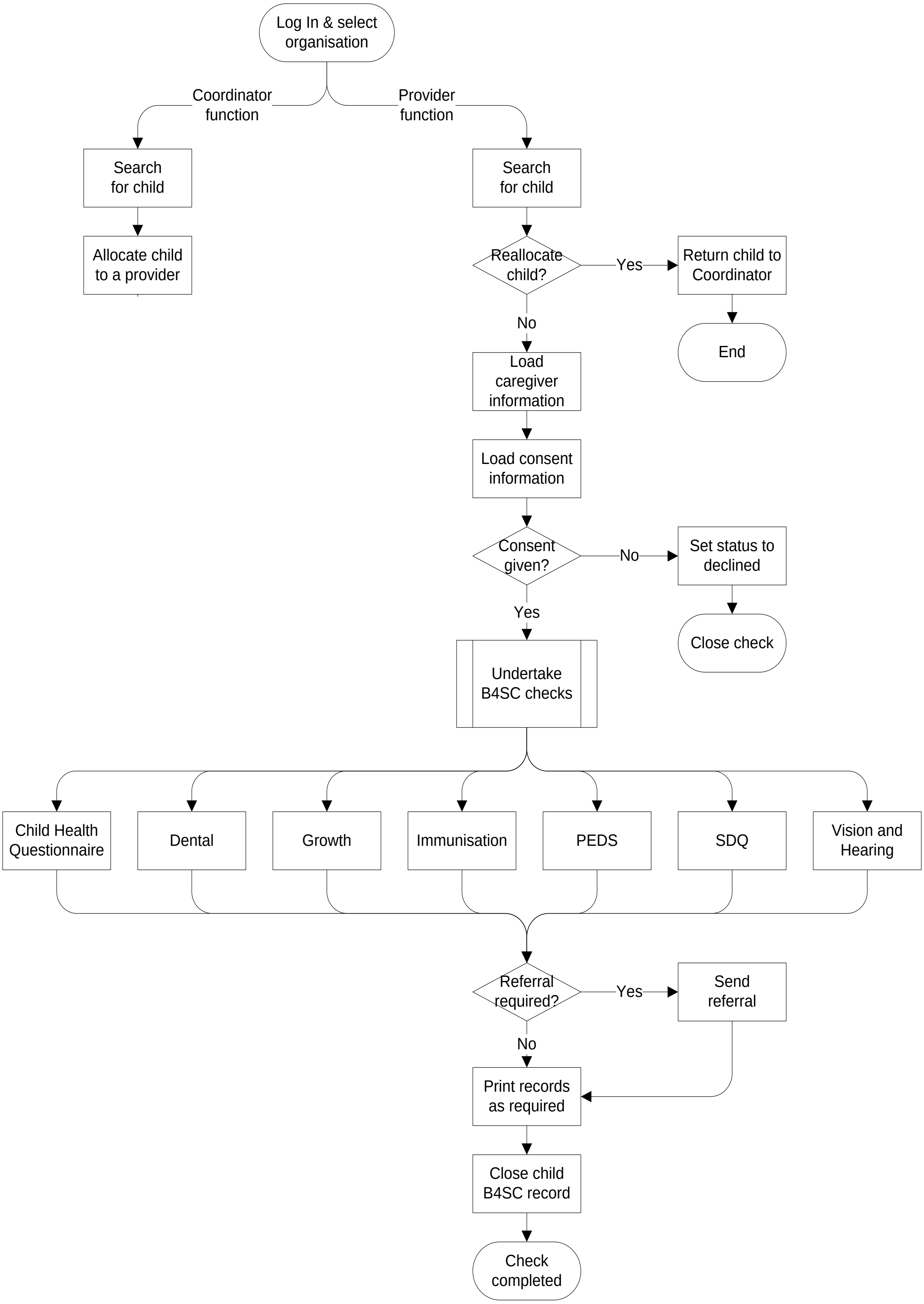
- The providers gain consent (from the child's caregiver) for the B4SCs, which are then conducted by the Provider or a representative of the Provider.
- Some components of the B4SC may be delivered by different providers to obtain a complete and holistic view of the child's health and well being.
- The vision and hearing component may be done by a Vision and Hearing Technician and the Strengths and Difficulties Questionnaire (SDQ), teacher questionnaire, is to be completed by the child's pre-school teacher if applicable.
- The rest of the B4SC is likely to be performed in one sitting.
- Results from the B4SC are entered into the B4SC IS.
- If referrals are outstanding, the Check can be completed, but not Closed.
- If no referrals are required, the child's B4SC record can be Completed and Closed.

3. Management of referrals

- Referrals are generated and processed where required.
- Referrals are followed up with the referred practitioner and, if the treatment outcome is known, this will be entered into the B4SC IS.
- Once all referrals are completed that child's record can be closed.

The following page provides an overview diagram of the B4 School Check process.

2.5 Overview Diagram for the B4 School Check Process



Also Refer to Appendix B Quick reference Guides, on Page 113 for each process.

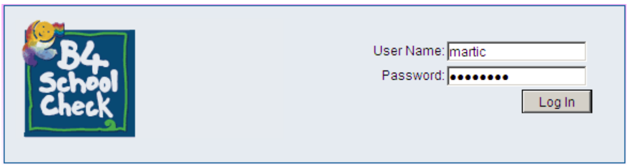
3 USER LOGIN

Production site: **http://10.247.236.25/WebPages/Login.aspx**

Training site: **http://10.247.236.20/WebPages/Login.aspx**

1. **Open** the link to the environment to use (i.e. production or training).

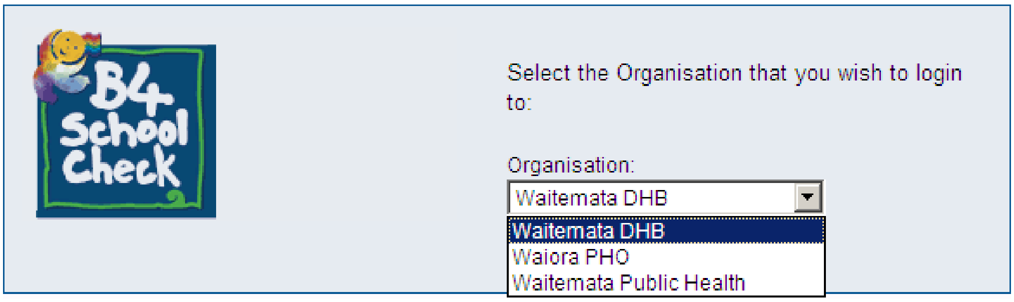
   The username and password prompt screen will be displayed.



2. Enter a **Username** and **Password**

3. Click **Login**

   Where a user is associated with multiple organisations, the following screen will appear:



Note:

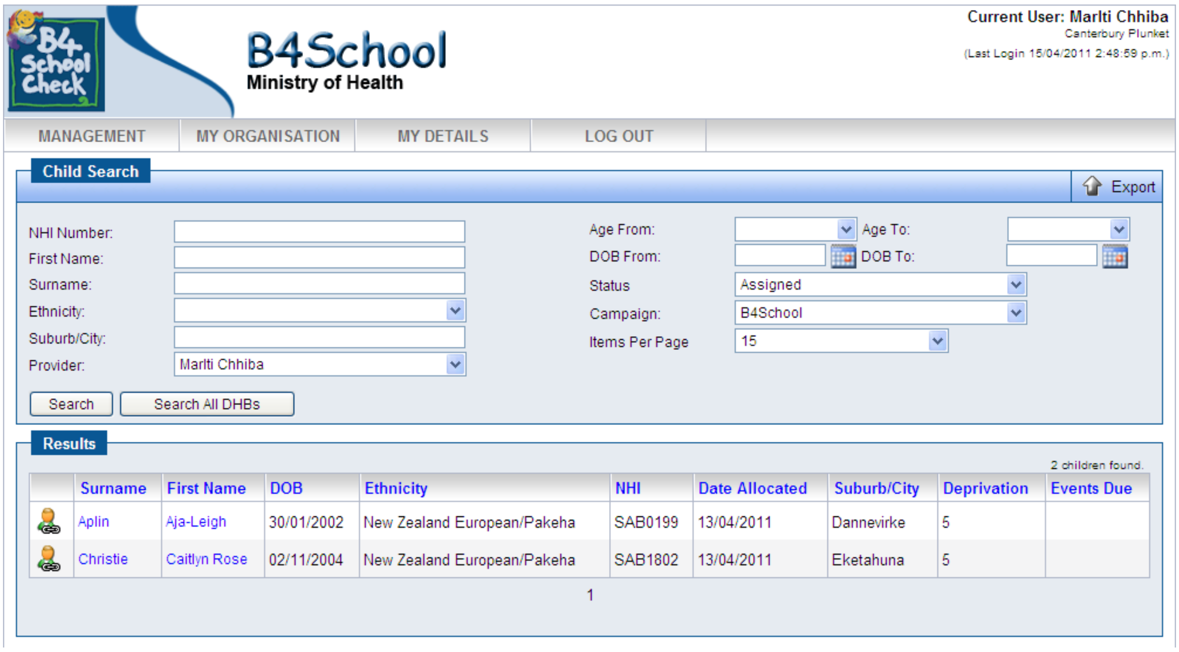
When using the training environment, most users are set up with multiple organisation access, to cover training for different roles.

4. **Select** the organisation to login to. The B4SC Coordinator will be able to advise which to use.

5. Click **OK**. Either the Allocation screen (for Coordinator's) or the Management screen (for Provider's) will appear, depending on the organisation type selected. These screens provide very similar search functionality.

4 SEARCH

4.1 Searching for a child in the user's DHB or area



1. Click on the **Management Tab** (or **Allocation Tab**)

   For Providers: the results displayed are children that have been Assigned to the provider. Assigned is the default view.

   For Co-ordinators: the results displayed are children who have been Returned. Returned is the default view. Changing the **Status** will show all children within their DHB for each status.

2. **Enter** the known details of the child into the search fields.

   For a detailed description of all Search Fields see:

   Field Descriptions for Search Fields on Page 11.

   Also see: Use of wild card character when exact spelling is not known on Page 13.

Note

A description of why the child's records has been Returned can now be seen as a tool tip in the allocation search page.

4.2 Searching for a child in another DHB

1. The **Search All DHBs** button in the Management Tab (or Allocation Tab), enables searching for a child in all DHBs.

Using search criteria will define the search to help with finding a specific child.

For a detailed description of all Search Fields see:

Field Descriptions for Search Fields on Page 11.

Also see Use of wild card character when exact spelling is not known on Page 13.

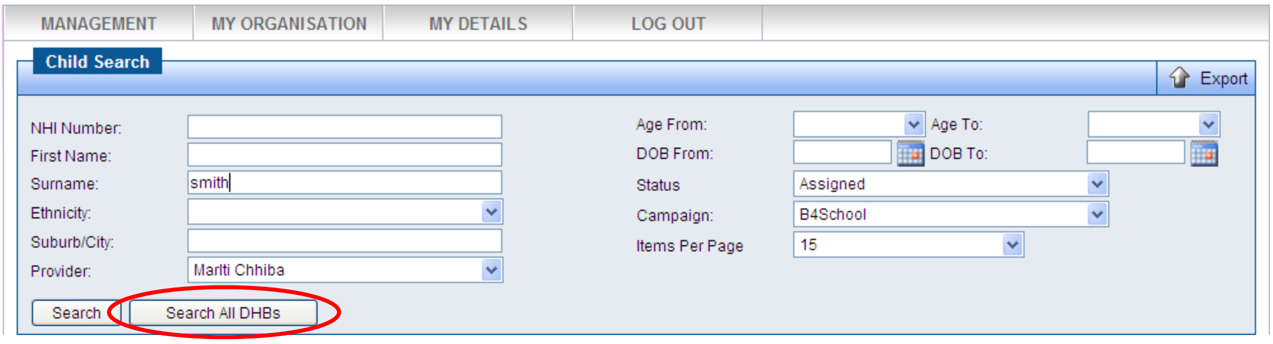


Figure 1 Search All DHB's

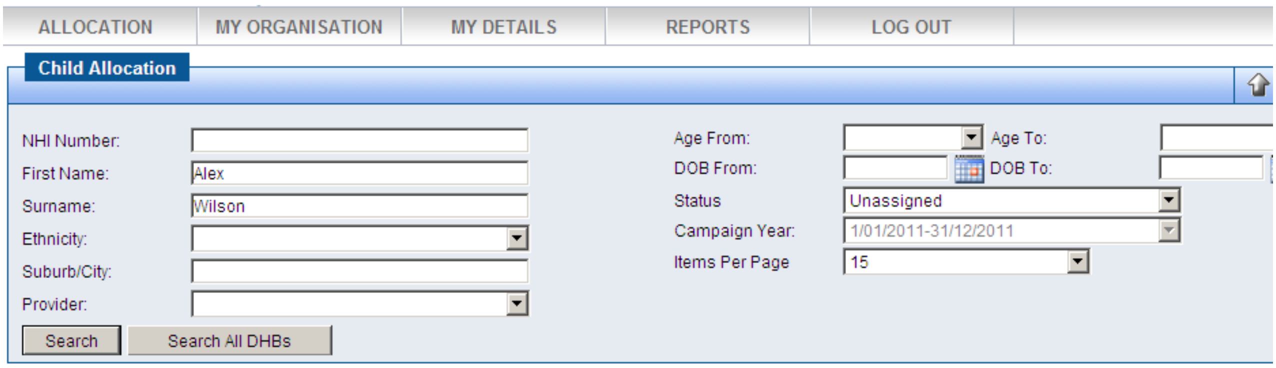
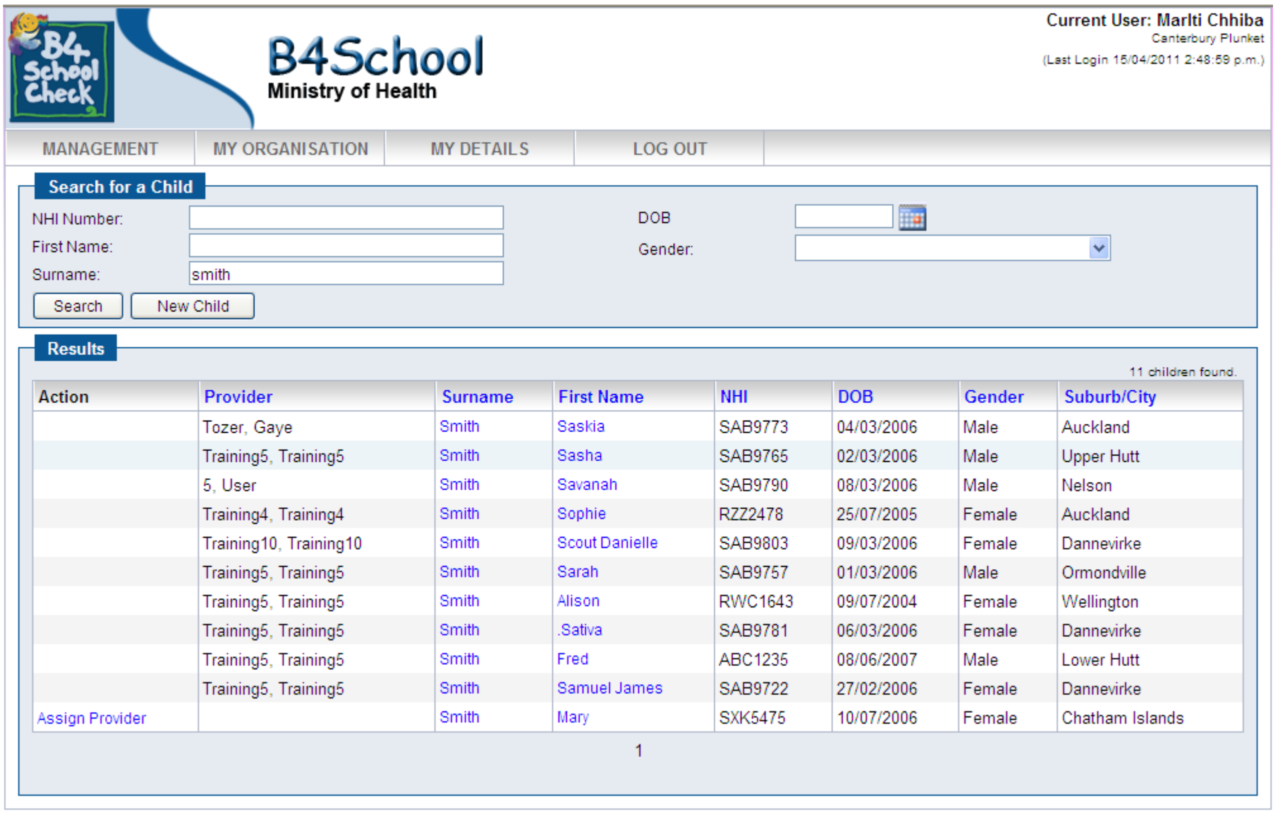


Figure 2 Search Criteria – Adding

2. Click the **Search All DHBs** button. The search results will be displayed.



B4School
Ministry of Health

Current User: Marlti Chhiba
Canterbury Plunket
(Last Login 15/04/2011 2:48:59 p.m.)

MANAGEMENT | MY ORGANISATION | MY DETAILS | LOG OUT

Search for a Child

NHI Number:
First Name:
Surname: smith
DOB
Gender:

Search | New Child

Results

11 children found.

Action	Provider	Surname	First Name	NHI	DOB	Gender	Suburb/City
	Tozer, Gaye	Smith	Saskia	SAB9773	04/03/2006	Male	Auckland
	Training5, Training5	Smith	Sasha	SAB9765	02/03/2006	Male	Upper Hutt
	5, User	Smith	Savanah	SAB9790	08/03/2006	Male	Nelson
	Training4, Training4	Smith	Sophie	RZZ2478	25/07/2005	Female	Auckland
	Training10, Training10	Smith	Scout Danielle	SAB9803	09/03/2006	Female	Dannevirke
	Training5, Training5	Smith	Sarah	SAB9757	01/03/2006	Male	Ormondville
	Training5, Training5	Smith	Alison	RWC1643	09/07/2004	Female	Wellington
	Training5, Training5	Smith	.Sativa	SAB9781	06/03/2006	Female	Dannevirke
	Training5, Training5	Smith	Fred	ABC1235	08/06/2007	Male	Lower Hutt
	Training5, Training5	Smith	Samuel James	SAB9722	27/02/2006	Female	Dannevirke
Assign Provider		Smith	Mary	SXK5475	10/07/2006	Female	Chatham Islands

1

Figure 3 Search Results

4.3 Field Descriptions for Search Fields

Search for children using the following search options in the Child Allocation area:

Search Field Name	Description
NHI Number	Returns a specific child with a known NHI number A complete NHI number must be entered. Searches cannot be performed on partial NHI numbers.
Name:	Use First Name or Surname to return all children with those names. Refer to Use of wild card character when exact spelling is not known on Page 13.
Ethnicity	Returns all children of that ethnicity
Suburb/City	Returns all children in that area Refer to the wild cards section below, to search for names where the spelling is not known or may be misspelt.
Provider	Allows Coordinator's only, to search by a provider within their Organisation. Used to filter by provider so coordinators can identify children assigned to a provider. The coordinator can also allocate children in bulk by selecting the children using the check boxes and clicking the reallocate icon. The providers that appear in the provider drop down are providers that currently have child allocations. The organisation the provider works is displayed next to their name so the coordinator can identify the provider if they work for more than one organisation. If the providers employment ends they will have the word "(Inactive)" next to their name.
Age Range	Shows children in that age range To find 4 year olds, select Age From: 4 to Age To: 5
Date of Birth Range	Returns all children within the range of defined calendar dates To search for a year, enter the four digit year only (e.g. 2010). To search for a month and year combination, enter a one or two digit month, a slash, and four digit year (e.g. 6/2010 or 06/2010). To search a full date, enter the date in format d/m/yyyy (e.g. 3/6/2010) or format dd/mm/yyyy (e.g. 03/06/2010). To search for a specific date, enter the required date in the DOB From field, and the following day's date in the DOB To field.
Status	Returns all children of the specified status, see Status Options on Page 12.

Status Options

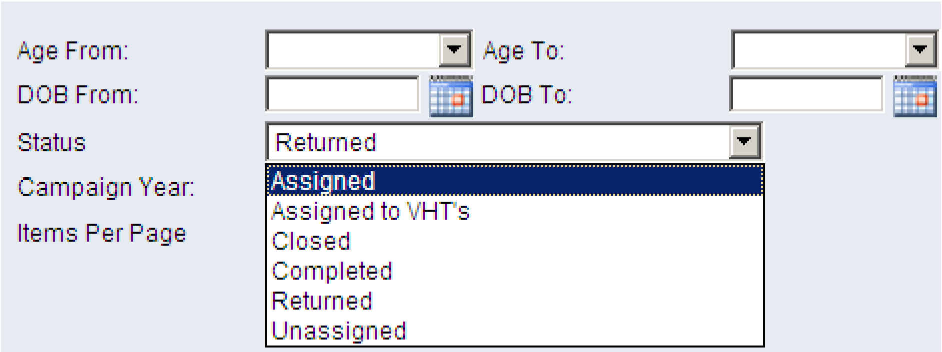


Figure 4 Status Options

Assigned	Displays only Checks assigned to a Provider
Completed	Displays only Checks Completed but process not Closed yet (e.g. awaiting completion of referrals)
Closed	Displays only Entire B4SC process Completed and Closed off
Unassigned	Requires assignment to a Provider
Returned	Displays Returned Records (this is the default view for all coordinators)

4.4 Use of wild card character when exact spelling is not known

Some text based search fields (e.g. first name, surname, city) allow for input of the first couple of characters to return all records starting with those characters (e.g. entering “sm” in the surname field returns all surnames starting with “sm”, such as “smith”, “smyth”, “smythe”, “small”, “smiggle”). A minimum of two characters must be entered for a search to execute.

If the correct spelling of a name is not known, or the spelling of a name in the database is incorrect, some text based search fields allow for the use of the percent wild card character (i.e. %) to replace one or more unknown characters. One or more % symbols can be used within a search field. The following table provides examples of wild card character usage.

User search input	Looks for:
sm (No wildcard character)	“Small”, “Smart”, “Smeed”, “Smith”, “Smyth”, “Smite”
sm%	All names starting with “sm”, and is exactly the same as searching for “sm” only (i.e. the % symbol is not required).
s%	All names starting with the letter s only. The % symbol is required to meet the minimum two character input field length.
sm%th	“Smith”, “Smyth”, “Smythe”, “Smithers”, but not “Smite”.
s%h	Same results using “sm%th”, plus “Schmidt”, “Shannon”, “Singh”
%h	All the above, plus any surname that starts with or contains the letter “h” or “H”
s%t%h	All names starting with “s”, and that contain a “t” and an “h” in that order (e.g. “Smith”, “Stephenson”, “St Joseph”)
%%	All names in the database, irrespective of spelling. This is not required if search criteria are entered into other fields. This search string is not recommended as it will return a large number of records and slow the system down while performing the query.
% % (i.e. %[space]%)	All names containing a space (e.g. “St Joseph”, “Anne Marie”) **Note** **Searching for a space only, must contain a % at each end as the space is not recognised as a character unless there is another character on each side of it.**
%-	All names containing a hyphen (e.g. “Billy-Bob”, “Smith-Jones”)

4.5 Sorting search results

Results matching the search criteria are presented in the **Results** area (bottom half of screen).

Results

595 children found.

Action	Provider	Surname	First Name	NHI	DOB	Gender	Suburb/City
	Coveny, Denise	Chapman	Juliet	DSH4869	08/03/2011	Female	Wanganui
		cawston	trina	FXF0757	29/03/2006	Female	Wanganui
Assign Provider		Takarangi	Kahu	HSZ0130	09/08/2005	Male	Manukau
	training, auckland	Rihia	John	HSZ3996	01/10/2005	Male	Manukau
Assign Provider		Pakai	Meihana	HTA6056	11/06/2005	Male	Lower Hutt
Assign Provider		Campbell	Mike	HTA8148	01/10/2005	Male	Manukau
Assign Provider		Hayward	Justin	HTB0479	04/06/2005	Male	Manukau
Assign Provider		Armstrong	Neil	HTB4199	09/11/2005	Male	Manukau
Assign Provider		Salter	Barry	HTB6574	16/01/2006	Male	Manukau
	Coveny, Denise	Atkinson	Jess	JES1234	16/02/2007	Male	Hastings
	1, Trainer	Chapman	Juliet	MQU2149	06/06/2009	Female	Wanganui
Assign Provider		Paki	Marcelus	NSQ6277	30/01/2006	Female	Tauranga
Assign Provider		Barnes	Zachary	RQE4395	10/10/2004	Male	Taupo
Assign Provider		Mcconachie	Lexie	RQS1936	04/11/2004	Female	Taupo
Assign Provider		Armstrong	Kelsey	RVM6631	07/07/2005	Female	Wellington

1 2 3 4 5 6 7 8 9 10 ...

Figure 5 Sorting Search Results

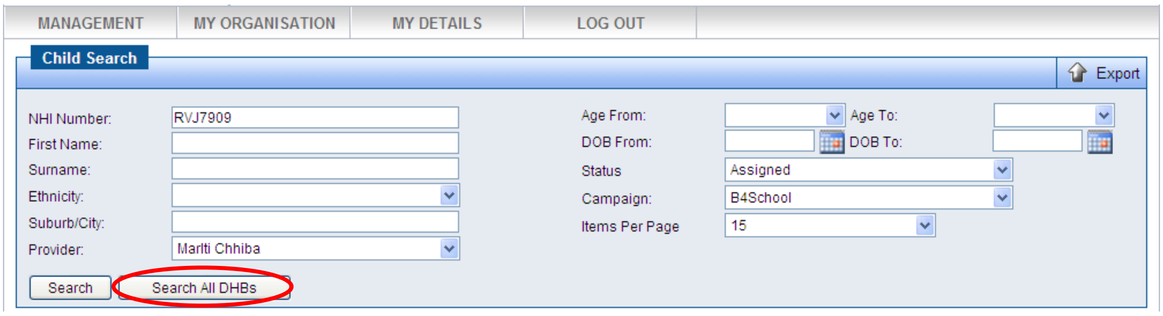
Sorting Tips

- Click a column heading to sort the results by that column.
- Click the column heading repeatedly to sort in either ascending or descending order.
- Some columns cannot be used to sort records (e.g. the "Action" column in the screen print above). Columns that cannot be sorted by will be in black text.
- Columns that can be sorted by will show an underline (i.e. a link) under the column heading when the mouse is hovered over them.
- Columns that have never been sorted before show blue column heading text.
- Columns that have been sorted on a previous occasion show as purple heading text.

5 ADDING A CHILD

If the child is not currently in the B4SC IS, the child must be manually loaded.

1. In the **Management Screen,** Enter the **Childs NHI**
2. Click **Search All DHB's** button



If the child is not already entered into the B4SC IS you will be presented with the **NEW Child Screen**:

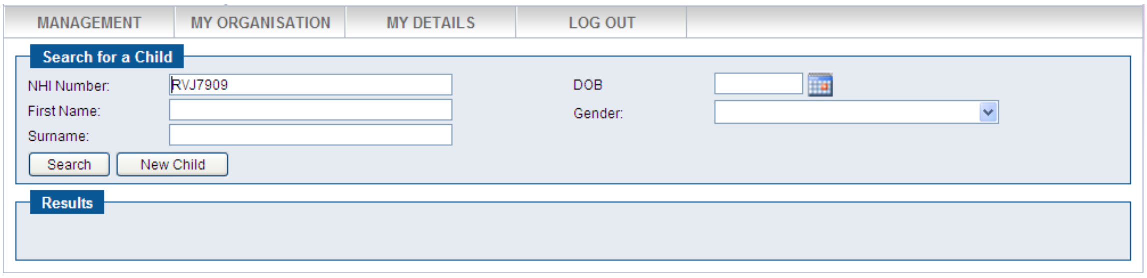
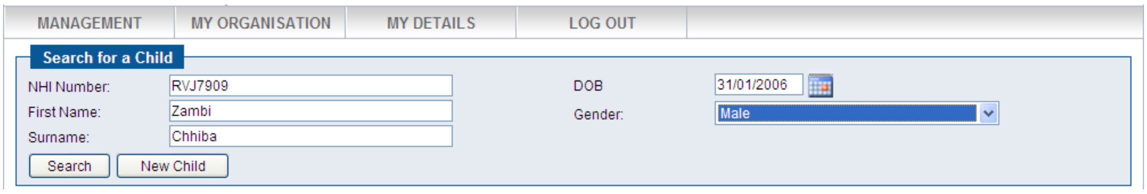


Figure 6 Adding a New Child

3. Complete all the following fields on the New Child Screen



- NHI
- First Name
- Surname
- Date of Birth
- Gender

4. If an NHI number is not known, follow the instructions on Page 29 Locate/allocate the National Health Index (NHI) number.

5. Click the **New Child** button. A child's record is created and the Child Information screen will be shown:

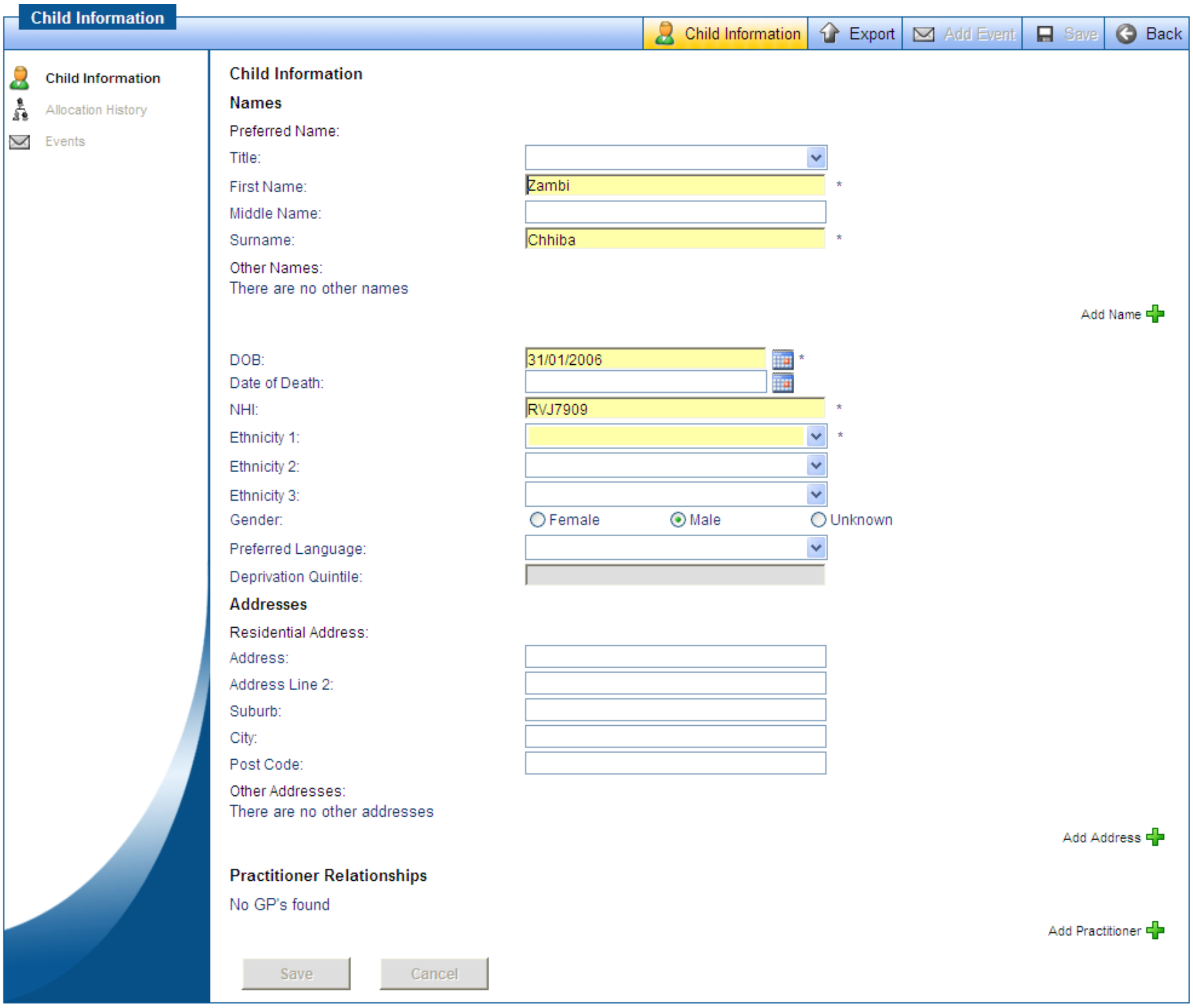


Figure 7 Child Information screen

6. **Load** all additional information including address.

   Yellow fields marked with an asterisk (*) are mandatory.

7. Click **Save**

8. You must return to the Management screen and allocate the child before you can continue with the check.

6 VIEWING AND EDITING CHILD INFORMATION

1. On the search results screen Click on the child's **first name** or **last name** to open the child's record.

   Or

2. Click the Child Information Tab, 

 if it is visible. The **Child Information** screen will appear.
   Refer to Figure 7 on Page 16 and Figure 8 on Page 18:
3. All **yellow boxes** (marked with an asterisk *) are mandatory
4. Input/update details as necessary.
5. Click **Save**

Important:

If any of the following fields are updated, also inform the person responsible for updating the NHI register in your organisation:

Date of Birth

Date of Death

Ethnicity

Gender

Deprivation Quintile

NHI number

Address

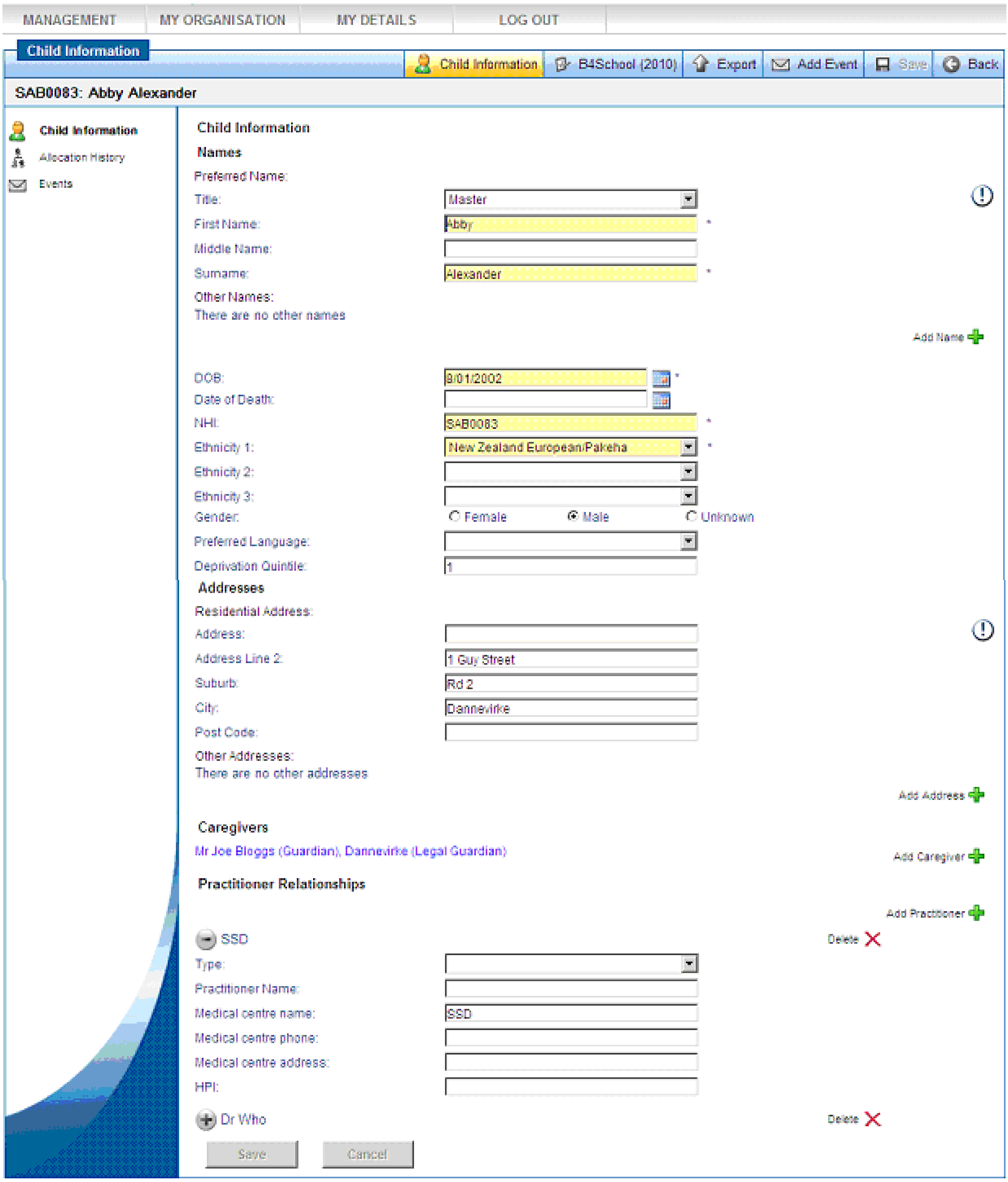


Figure 8 Child Information Screen – Adding Information

6.1 Additional Information about the Child Information Screen

From the Child Information Screen, a user can:

- Add or edit child names
- Add or edit date of birth, date of death, ethnicity, gender, deprivation quintile, and NHI number
- Add or edit address details (including additional addresses associated with the child, caregiver, or legal guardian).
- Access the fields to add/amend caregiver details
- Access the fields to add/amend practitioner details
- View Allocation History and return the child for reallocation to the Coordinator (if already assigned to the provider)
- View Events history.

Adding/Editing a Primary Caregiver or Legal Guardian

1. Click a caregiver's name, or select the "Add Caregiver" link to the right of the Caregiver section.
    - The person who gives consent must be either the child's caregiver or legal guardian. If the child stays with someone who is neither of the above, that person cannot give consent.
    - Once a caregiver is loaded, click the appropriate tick boxes; Is Primary Caregiver, Lives with Child, Legal Guardian, to allow permission.

Validate the NHI number

This is done in cases where a child presents for a check but is not in the system database.

From the Child Information screen enter the child's details. After entering the NHI, the system automatically validates if the NHI number is valid (an invalid NHI will show a red asterisk next to the field, and an error message will be displayed if the Save button is clicked. Once the NHI number is validated, the child's details will be imported from the NHI database into the system database. For further information also see Locate/allocate the National Health Index (NHI) number on Page 29.

Deprivation scale

Deprivation Quintile – Social Economic Scale

Deprivation quintile within the child summary page is a read only field. Only change of address can alter this field.

Hover in the Deprivation scale box to see the following Tip Box:

We use the five point NZDEP deprivation scale. '1' is the least deprived and '5' is the most deprived. The five point deprivation scale is derived from the ten point deprivation scale. The ten point scale is divided by 2 and rounded to the nearest whole number. So 9 to 10 on the ten point scale equates to 5 on the five point scale etceteras. A '0' deprivation means the deprivation is unknown.

Quintiles range from:

Deprivation depends on the area where child lives. For the purposes of the B4SCs the deprivation quintiles have been grouped into three levels:

Level 1: Quintiles 1 and 2 for lowest deprivation

Level 2: Quintiles 3 and 4 for medium deprivation

Level 3: Quintiles 5 for greatest deprivation

Deprivation quintile within the child summary page is a read only field. Only change of address can alter this field.

Note

When the address is unknown a 0 or Blank may show.

7 ALLOCATING CHILDREN

7.1 Centralised versus Distributed Service Models

DHBs can choose a centralised or distributed allocation process for allocating children to providers. For further information of the roles of the Coordinator and Lead Provider, refer to Users of the System and their Roles on Page 4.

Centralised service model (push model)

The Coordinator allocates children to the Lead Providers (or providers) for each provider organisation. The Lead Provider (likely to be the nursing team leader) then has the option to reallocate the children among the providers within their organisation (including to themselves).

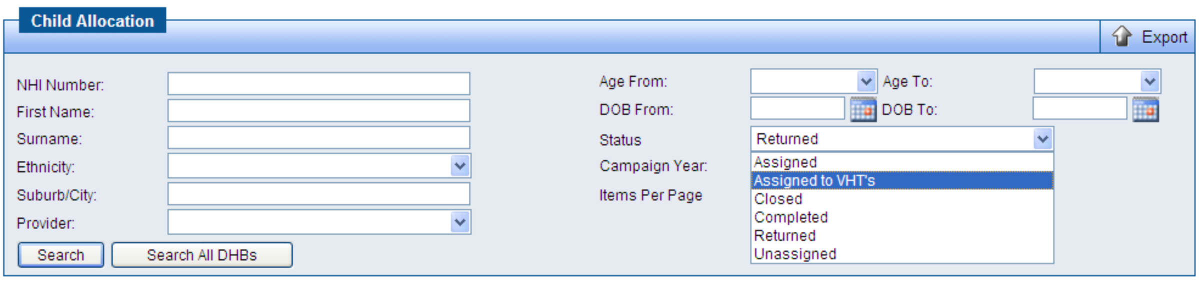
Distributed service model (pull model)

A provider can 'pull' a child B4SC records from the returned and unassigned list of children.

7.2 B4SC Coordinator– Assign child to a provider

Select Child or Children

1. From the Allocation tab, the coordinator should search for unassigned children using one of three statuses:
   - Unassgined
   - Assigned to VHT Provider
   - Returned Child



Tip

A search may result in a large number of child records being displayed in the results area. Refining the search using additional criteria fields will reduce the number of records presented, and reduce the waiting time for the query to run.

2. To allocate, a single child (or a number of children) to a Provider:

   (a) To select a single child, click the tick box beside the child's name in the Results area.

   (b) To select a number of children, click the relevant tick boxes beside the children's names in the Results area.

   (c) To select the whole page of children click the tick box column heading indicated below.

Results

3 children found.

	Provider	Surname	First Name	DOB	Ethnicity	NHI	Suburb/City	Deprivation	Assigned On	Notes
	7, User	Sigvertsen	Samuel	19/02/2006	New Zealand European/Pakeha	SAB9692	Dannevirke	4	28/05/2010	
☐	Assign Provider	Smyth	Sean	09/03/2006	Not Stated	SAB9811	Ormondville	4		
☐	Assign Provider	Smyth	Sean	12/03/2006	European Not Further Defined	SAB9820	Dannevirke	2		

1

Tip

The icon indicates the child has previously been allocated to a provider. Clicking this icon allows the child to be reallocated to another provider.

To assign one child

1. To **assign one child** to a Provider, click the "Assign Provider" link (Assign Provider) next to the child to be assigned.

Results

3 children found.

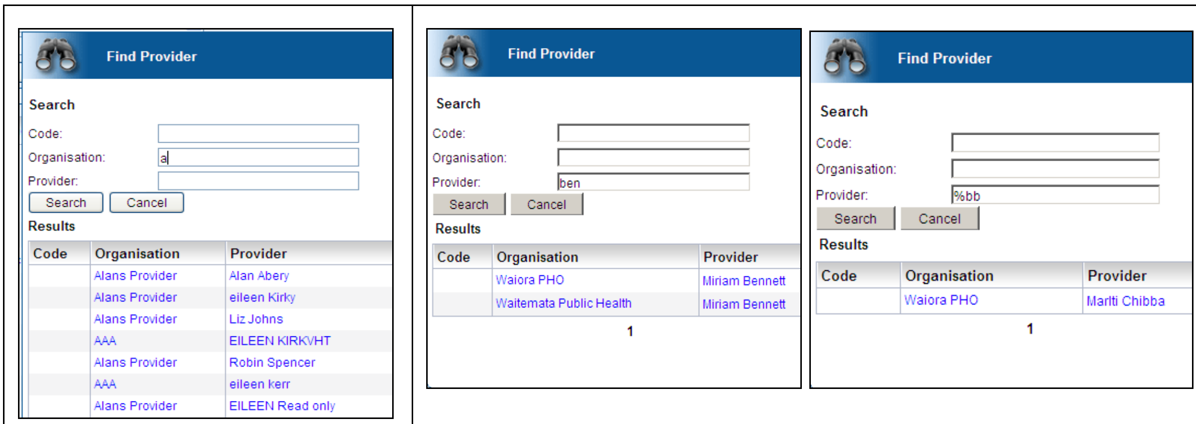
	Provider	Surname	First Name	DOB	Ethnicity	NHI	Suburb/City	Deprivation	Assigned On	Notes
	7, User	Sigvertsen	Samuel	19/02/2006	New Zealand European/Pakeha	SAB9692	Dannevirke	4	28/05/2010	
☐	Assign Provider	Smyth	Sean	09/03/2006	Not Stated	SAB9811	Ormondville	4		
☐	Assign Provider	Smyth	Sean	12/03/2006	European Not Further Defined	SAB9820	Dannevirke	2		

1

Figure 9 Assigning One Child to Provider

For Providers: The child will be assigned to you

For Co-ordinators: A 'Find/Provider' search box will appear to assign a provider (see next page)



Shows all providers linked to the provider organisation.

Shows names and provider organisation they are associated with.
The screen on the right shows use of the % wild card character.

Figure 10 Assigning a Provider

(i) Search for a provider using one of the fields in the “Find Provider” search box.

(ii) Type the first letter of the provider organisation, or First/Surname of the provider. Click **Search**.

(iii) **Click** on the Provider name you want to allocate the child to.

To assign multiple children:

1. Select each tick box beside the required children Or…

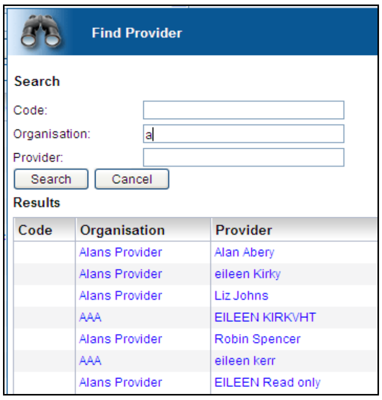
Select the tick box in the column header (☑ ☐) to check the tick boxes of all children in view.

Figure 11 Assigning Multiple Children to Provider

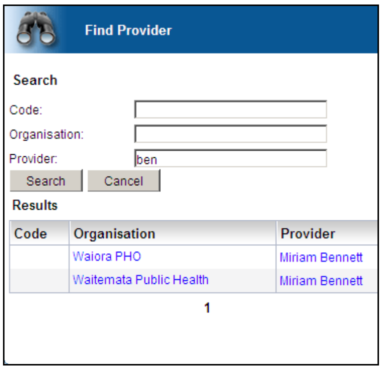
2. Click the Assign Provider link (Assign Provider) against any selected child.

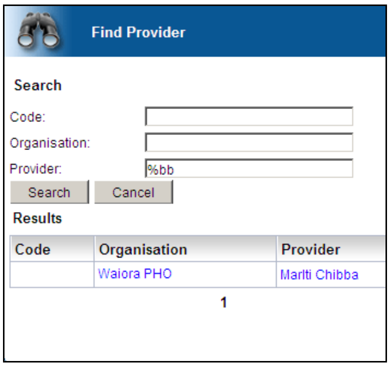
For Providers: The children will be assigned to you

For Co-ordinators: A ‘Find/Provider’ search box will appear to assign a provider (see next page)



Shows all providers linked to the provider organisation.





Shows names and provider organisation they are associated with.
The screen on the right shows use of the % wild card character.

(i) Search for a provider using one of the fields in the “Find Provider” search box.

(ii) Type the first letter of the provider organisation, or first / surname of the provider. Click **Search**.

(iii) **Click** on the Provider name you want to allocate the children to.

Tip

The wild card character % (percent) can be used in place of characters in names. Refer to the Search section of this document for more details (“Use of wild card character when exact spelling not known” subsection).

7.3 Reallocate child to another provider

1. **Search** for the child from the Allocation screen. Ensure the Status is set to Assigned.
2. Click the Search button if the expected results do not appear, refine the search criteria.
3. Once the child being reassigned is visible, click to reallocate the child to another provider. The diagram below shows the wording “Reallocate child” when the mouse is hovered over this icon.

Results

1 child found.

Action	Provider	Surname	First Name	NHI	DOB	Gender	Suburb/City
	Chhiba, Marlti	Dayal	Zambi	RVJ7909	31/01/2006	Male	Wellington

Reallocate child

1

Figure 12 Reallocate Child to another Provider

New functionality

Coordinators can reallocate a ‘returned child’ from another DHB

This allows other DHB coordinator’s to reallocate ‘returned’ children to their providers - transferring a child from one DHB to another. Coordinator’s can pull ‘returned’ children from other DHBs.

If the child is already assigned to a Provider in the original DHB, that Provider must return the child before the record can be reallocatd.

For further information also see Allocation history/return child for reallocation on Page 27.

7.4 View Assigned Children

Coordinator's and Lead Providers can view children that have been assigned to providers in their region, by selecting the Provider name from the Provider drop down list.

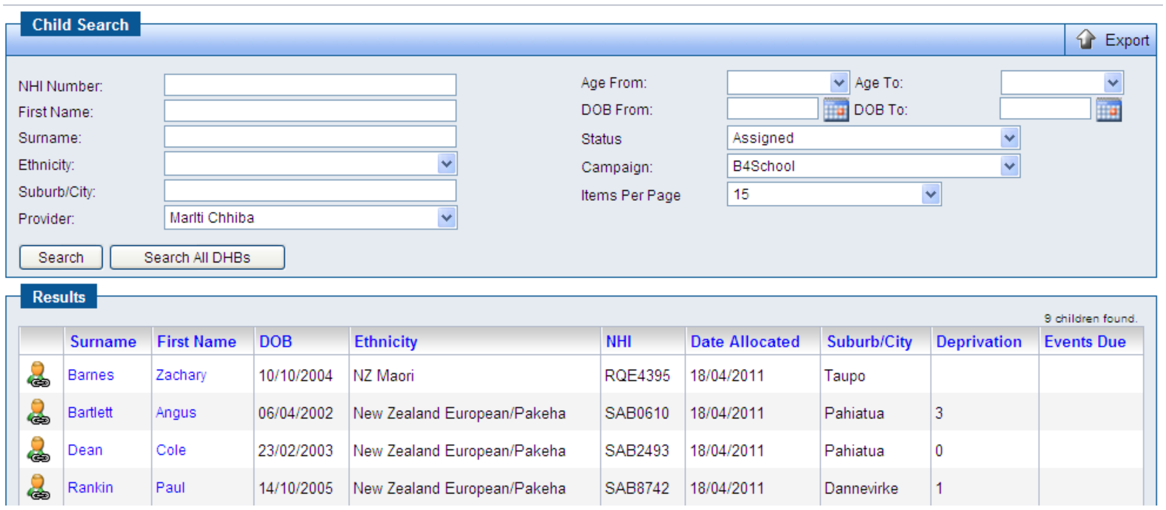


Figure 13 Search – Children Assigned to Provider

A Provider can view their list of children by Assigned and Completed. This means Providers can see which children need to have their records closed by filtering by completed: Providers do not get the Provider filter option.

1. On the Child Allocation/Management screen, criteria area, click the **Status** dropdown

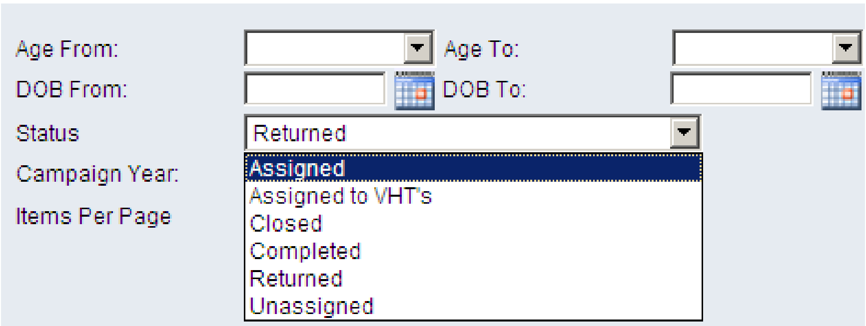


Figure 14 Status Options

2. Select **Assigned** or **Completed**
3. Click the **Search** button – All assigned children will appear in the Results area

Note

The VHT functionality has not been changed, the child will still be visible in the VHT's list until they are not longer the VHT in the VHT drop down in the Overview page or the childs B4SC status is set to closed. The VHT will be able to filter out children that have the completed status like all other providers.

7.5 Allocation history/return child for reallocation

Providers can reallocate or return a child to DHB coordinators under the following circumstances:

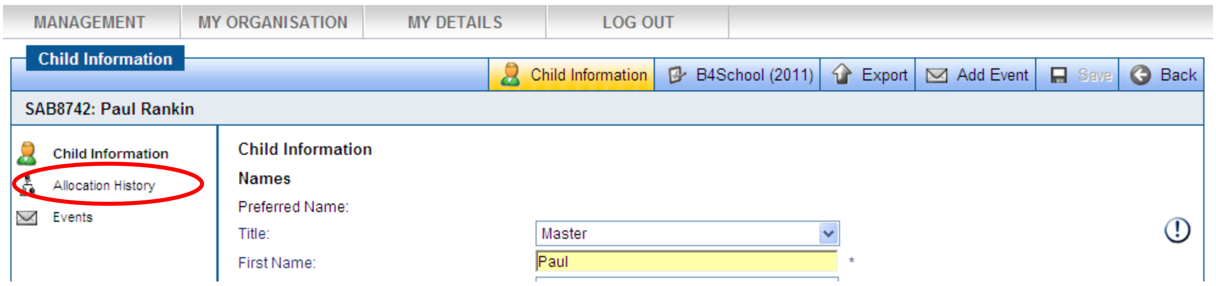
- When child moves to another region or when the Provider cannot deliver the service to this child for some reason.
- When a child looks to be in the wrong DHB cohort, address details are out of date or incorrect
- When the Provider can’t locate/find the child
- When the child was incorrectly allocated (incorrect provider)

To return a child for reallocation:

1. If the child is to be returned for reallocation **Login** as a Provider. The return for reallocation functionality can only be used by the Provider, and not the Lead Provider or DHB.
2. Click on Child’s name to view their details

   (or click the Child Information Tab, 

 if it is visible)
3. From the left menu panel, click the **Allocation History** link



4. The Allocation History screen will be displayed.

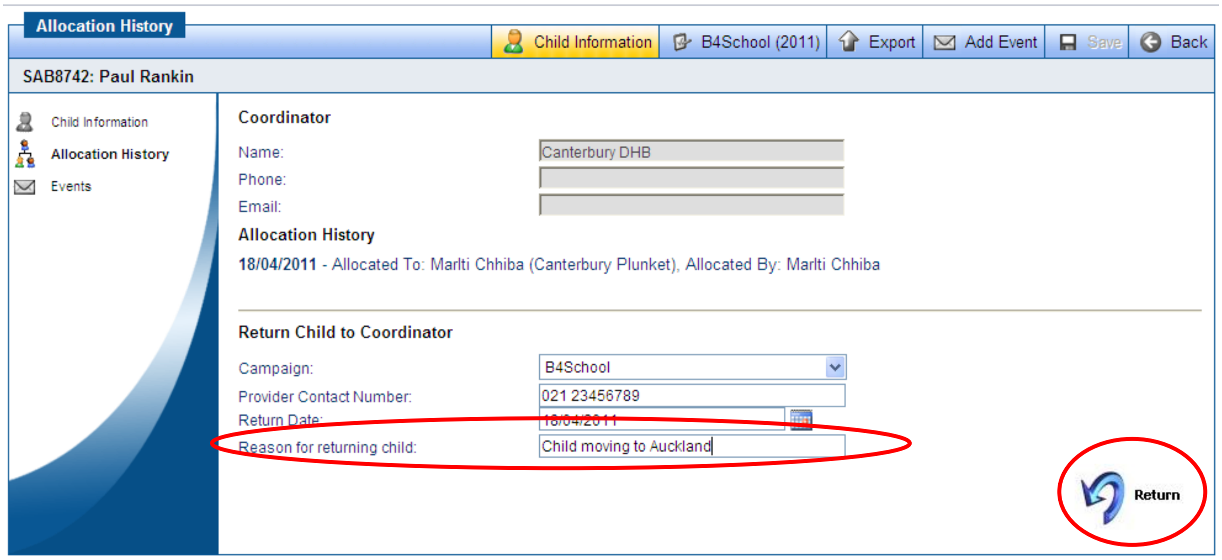
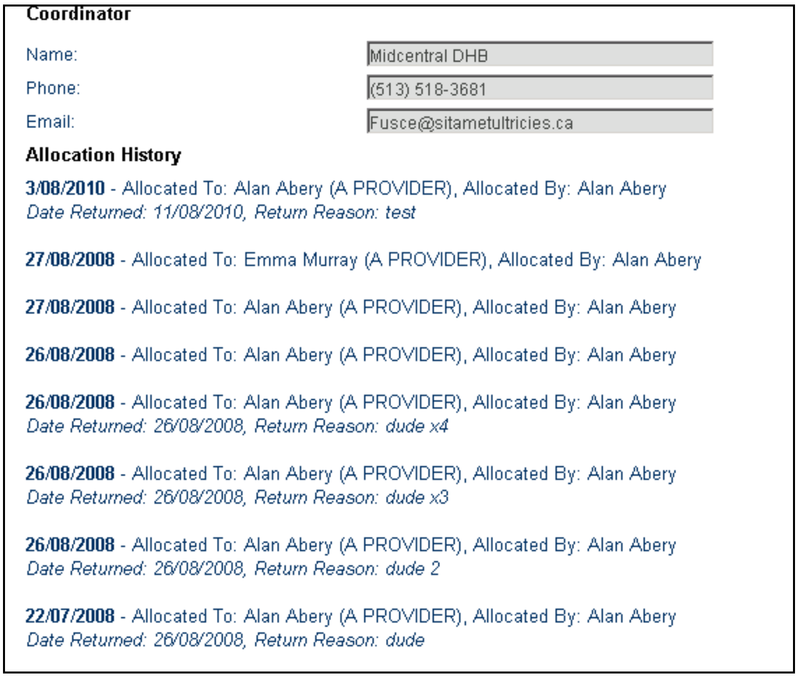


Figure 15 Allocation History/Return Child Screen

5. Enter the reason in the **“Reason for returning child”** field

6. Click on the **Return** arrow (bottom right of screen).

7. The child is removed from the Provider’s management list, and returned to the Coordinator.



Coordinator

Name: Midcentral DHB

Phone: (513) 518-3681

Email: Fusce@sitametultricies.ca

Allocation History

3/08/2010 - Allocated To: Alan Abery (A PROVIDER), Allocated By: Alan Abery
Date Returned: 11/08/2010, Return Reason: test

27/08/2008 - Allocated To: Emma Murray (A PROVIDER), Allocated By: Alan Abery

27/08/2008 - Allocated To: Alan Abery (A PROVIDER), Allocated By: Alan Abery

26/08/2008 - Allocated To: Alan Abery (A PROVIDER), Allocated By: Alan Abery

26/08/2008 - Allocated To: Alan Abery (A PROVIDER), Allocated By: Alan Abery
Date Returned: 26/08/2008, Return Reason: dude x4

26/08/2008 - Allocated To: Alan Abery (A PROVIDER), Allocated By: Alan Abery
Date Returned: 26/08/2008, Return Reason: dude x3

26/08/2008 - Allocated To: Alan Abery (A PROVIDER), Allocated By: Alan Abery
Date Returned: 26/08/2008, Return Reason: dude 2

22/07/2008 - Allocated To: Alan Abery (A PROVIDER), Allocated By: Alan Abery
Date Returned: 26/08/2008, Return Reason: dude

Figure 16 Allocation History/Return Child Screen – Display Order

Tip

The Allocation History displays who returned the child and what the reason was.

The allocation history orders by date allocated.

7.6 Locate/allocate the National Health Index (NHI) number

A child's NHI number can be found in their Well Child book, through their GP, on the National Immunisation Register (NIR) system, and the B4SC system (search and view child details).

Obtain a new NHI number

If a child does not have an NHI number but is eligible for a B4SC, request a new NHI number through the current DHB or provider organisation process. Requirements for a new NHI number are a child's date of birth, first name, and surname. A new NHI number will be issued by the NHI call centre on **0800 855 151**.

The NHI call centre should be contacted to:

- **(a)** Issue a new NHI number
- **(b)** Inform them of a change to a child's details against their NHI number. For example, a change of address or correction of the DOB. Corrections to the DOB need to verified and cited from the child's birth certificate or passport by the provider.
- **(c)** Report duplicates where people share an NHI number

Important

The NHI Call Centre require callers to give a PAYEE ID number so they can identify the caller as a provider. Provider requests will be processed and the NHI register will be updated as applicable.

Obtain a new Payee ID number

Providers who do not have a PAYEE ID number, and will be responsible for issuing and updating NHI details on behalf of their organisation or DHB, will need to apply for a PAYEE ID number.

To check eligibility for a PAYEE ID number, or to apply for one, contact Sector Services at the Ministry of Health on **0800 281 222**. Select call options '4' and then '1' to go through to the Primary Care Team. An application form will need to completed and returned to Sector Services.

7.7 Deceased Children

If a date of death is entered into the system, the System clearly shows when a child is deceased. A rose will appear in the Action column when a search is performed and a rose will also appear by the NHI number and child's name, in the Child Information Screen along with the word (deceased). A deceased child will no longer appear in extracts.

Once a child is deceased the child's record cannot be changed. However the caregivers can be (this is to accommodate possible future functionality where multiple children are linked to the same caregiver). The child will no longer appear in allocation or management searches however they can still be found in All DHB searches but cannot be allocated. If they are currently allocated their B4SC record is closed. Removing Dates of Death must be done via the helpdesk.

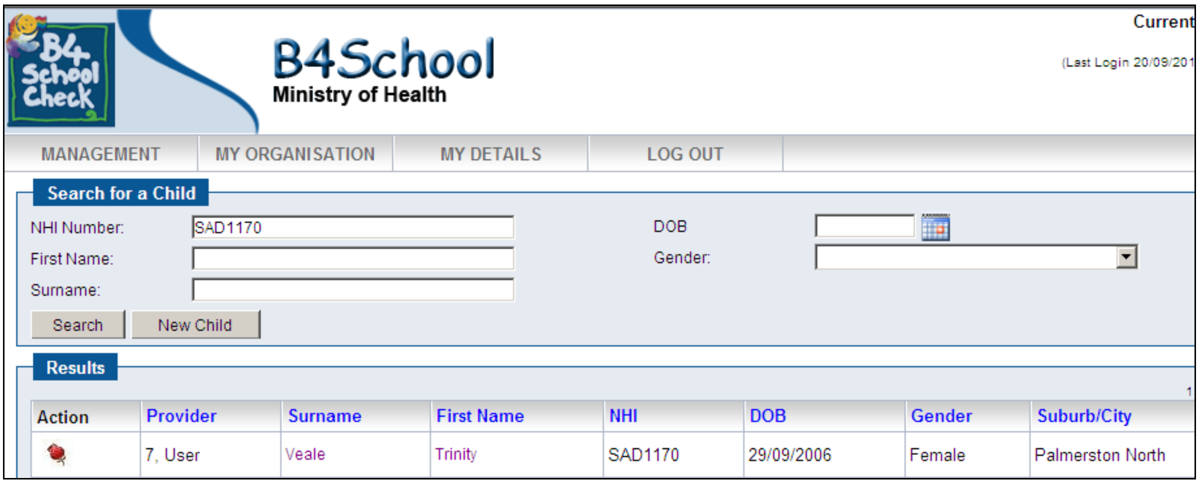


Figure 17 Deceased Child in Result Screen

Figure 18 Deceased Child – Child Information Screen

PROVIDER FUNCTION – MANAGING B4 SCHOOL CHECKS

To enable details of the Checks to be entered into the information system, consent must be noted in the system.

Caregivers information must be entered to allow consent to be entered.

8 CHILD INFORMATION

8.1 Add caregiver information

1. Click the **child's name,** and then click the **Child's Information** tab

2. Scroll to the bottom of the Child's Information screen, and click **Add Caregiver**

Caregiver Information Screen is displayed on Page 32.

3. Add caregiver details
   - **(a)** All yellow boxes (also marked with an asterisk *) are compulsory.
   - **(b)** The option to receive text messages can be recorded and may be useful for sending appointment reminders.
4. Click **Save** (either from the top of the screen or save button at the bottom of the screen).

Note

Only a 'Primary Caregiver' or 'legal guardian' can consent for a Check to be completed.

Caregiver Information Screen

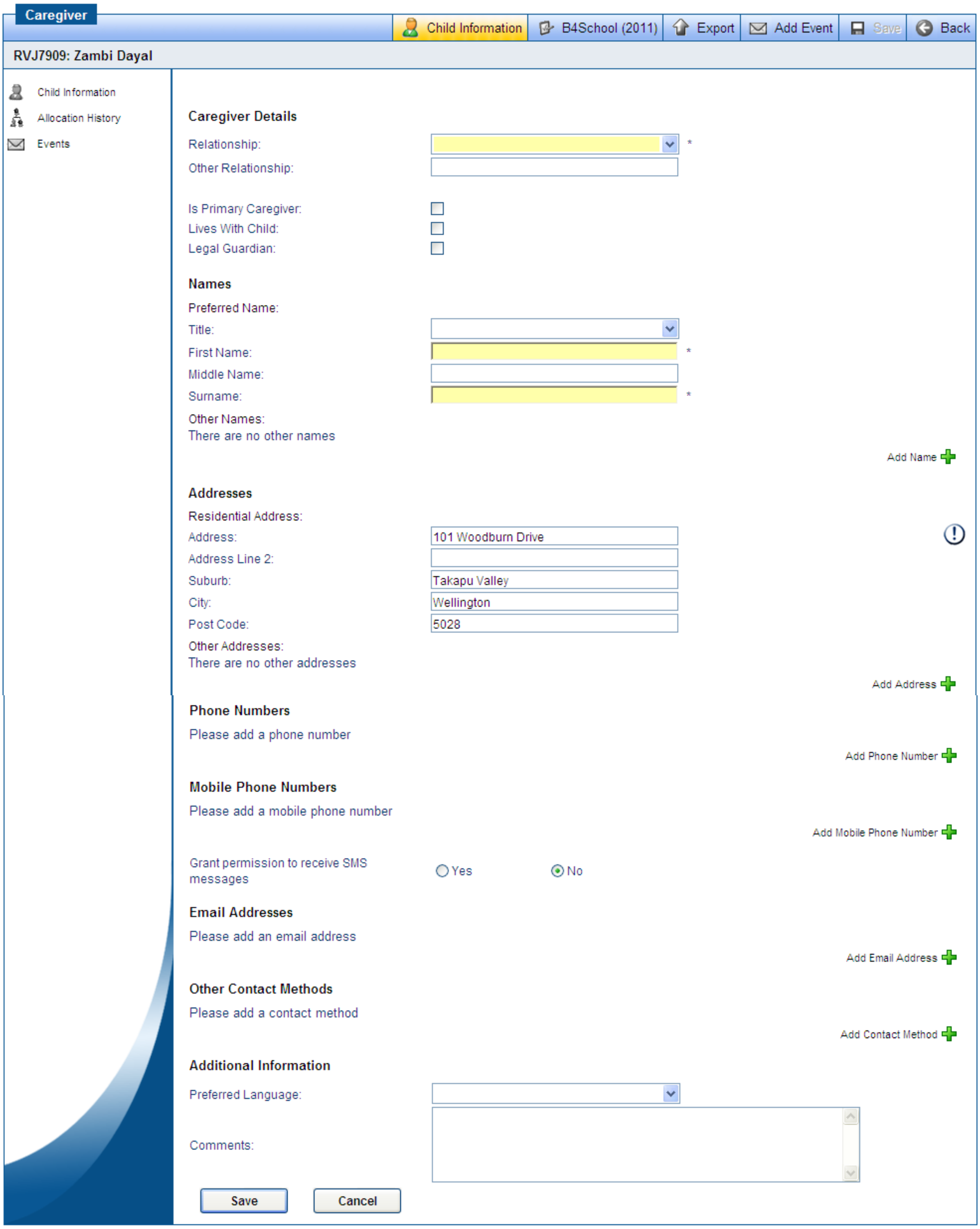


Figure 19 Caregiver Information Screen

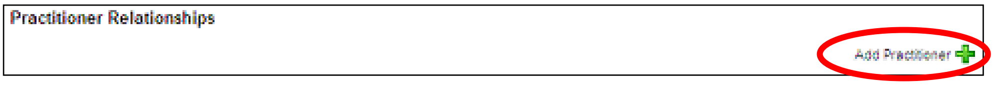
9 PRACTITIONER INFORMATION

9.1 Add practitioner information

This section is used to add the name of the practitioners (dentists, GPs, etc) associated with the child. Multiple practitioners of the same type can be added (e.g. the child can be associated with multiple GPs).

1. Click the **child's name,** and the click the **Child's Information** tab

2. **Scroll** to the bottom of the Child's Information screen, and click **Add Caregiver**



This will open a new practitioner section on the Overview screen.

3. **Add** practitioner details

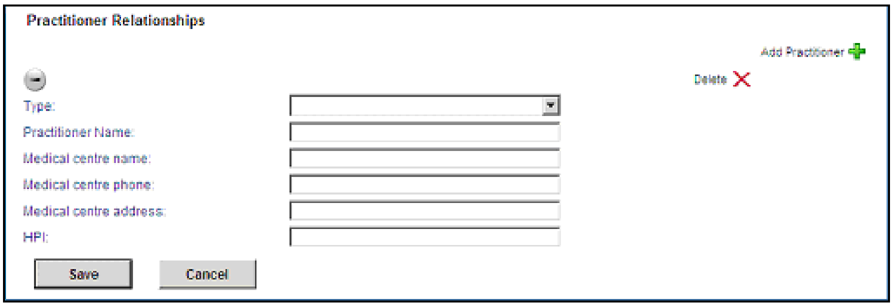


Figure 20 Practitioner Information Screen

4. Click **Save** (this is the Save button for all details on the Overview screen).
5. The practitioner details will be shown in a "rolled" up section on the Overview screen.

Click the + button () to view/edit the practitioner details.

Click the – button () to "roll up" the practitioner details.

Click the Delete link (Delete) to remove the practitioner details (click Save when finished).

Note

If only a medical centre is known (no specific practitioner name), copy the medical centre name into the "Practitioner Name" field. If the "Practitioner Name" field is left blank, the "Medical centre name" field will not be picked up in reporting.

10 CONSENT DETAILS

10.1 Adding Consent Details

To add consent use the following process:

1. Click the Child Information 

tab

2. Ensure Caregivers Details have been entered

3. Click the “B4School (YYYY)” 

tab (this will only appear if the child has been assigned to YOU as the provider or if you are a coordinator. The following screen will appear.

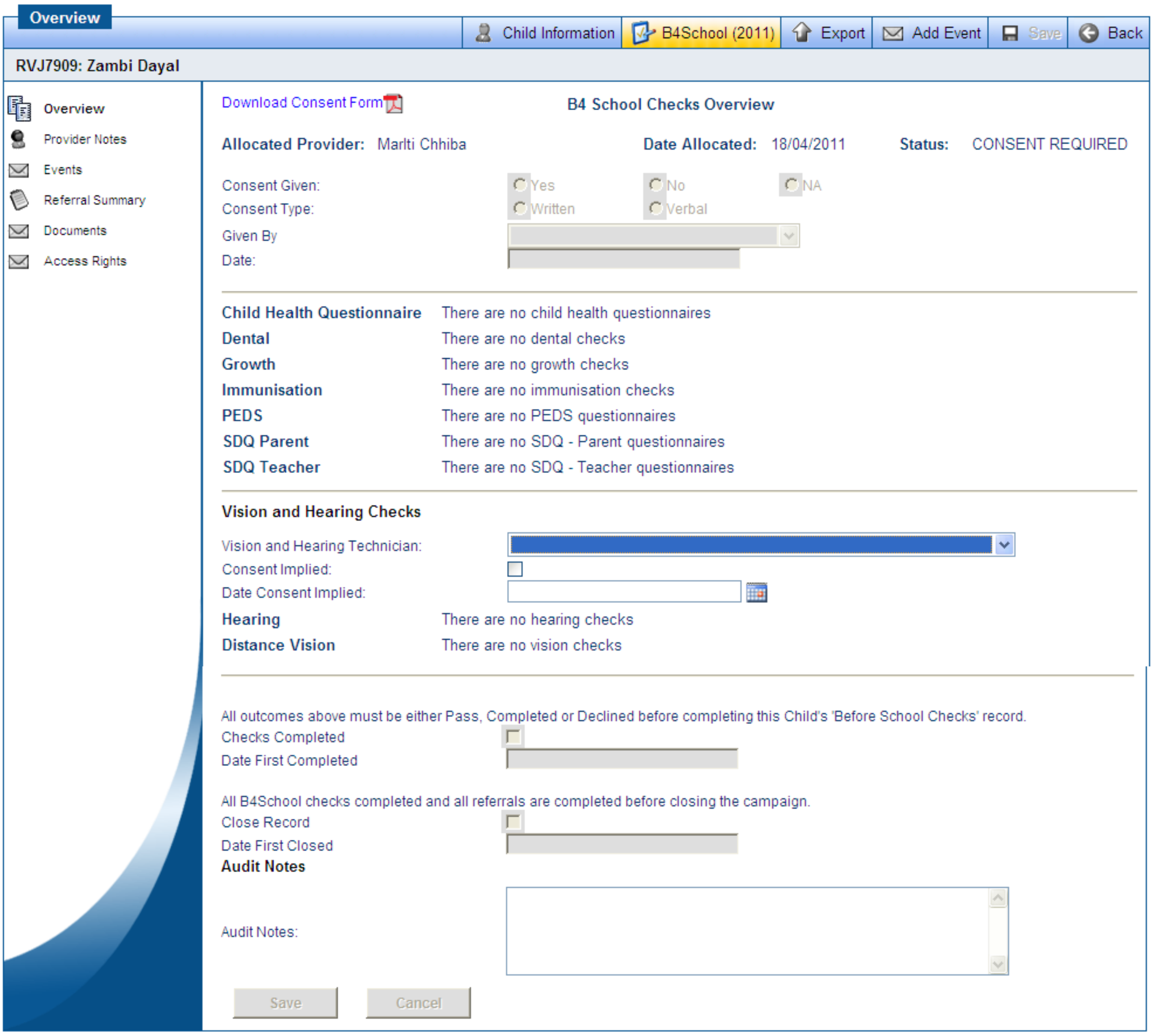


Figure 21 Consent Details Screen

4. Fill in the following details: (these can only be filled once the caregivers details are loaded on the Child Information screen)

(a) Consent Given – Yes, No, or N/A.

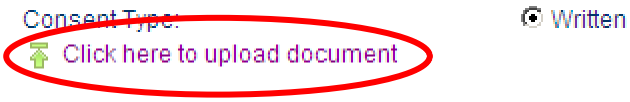
(i) If **Yes** is chosen, you can enter the checks details once the **Save** button is clicked.

(ii) If **No** is chosen, no checks are available once the **Save** button is clicked.

(iii) If **N/A** is chosen, a notes field appears. This must be filled in before clicking the Save button (otherwise an error message appears, asking for notes to be added). After a note is added, the checks will become available (once the **Save** button is clicked).

(b) Consent Type – select either Written or Verbal

(i) If **Written** is chosen, an upload link appears.



Upload the consent document (e.g. PDF of a scanned document signed by the caregiver).

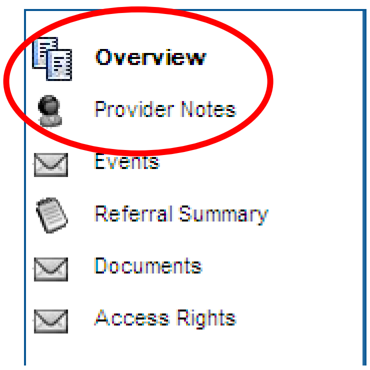
Once a document is uploaded, the above link changes to a download link

The uploaded consent document can also be obtained from the Documents link in the left panel.

(ii) If **Verbal** is chosen, it is recommended that a provider note is entered to describe who gave the verbal permission, when the permission was provided, and any details of what was said (by both the provider and the caregiver).

Enter the provider note <u>after</u> the Overview screen has been completed and Saved with consent details.

To enter a Provider Note, click the "**Provider Note**" link in the left panel,



Add a note and click **Save**.

(For detailed information see [Provider notes on Page 67).](#)

Click the **Overview link** to return to the Overview screen.

(iii) Given By – select from the drop down list

(iv) Date – Enter the date that this consent was given

5. Click the **Save** Button. The various checks will become available. This is shown with (Add New) links against each of the checks.

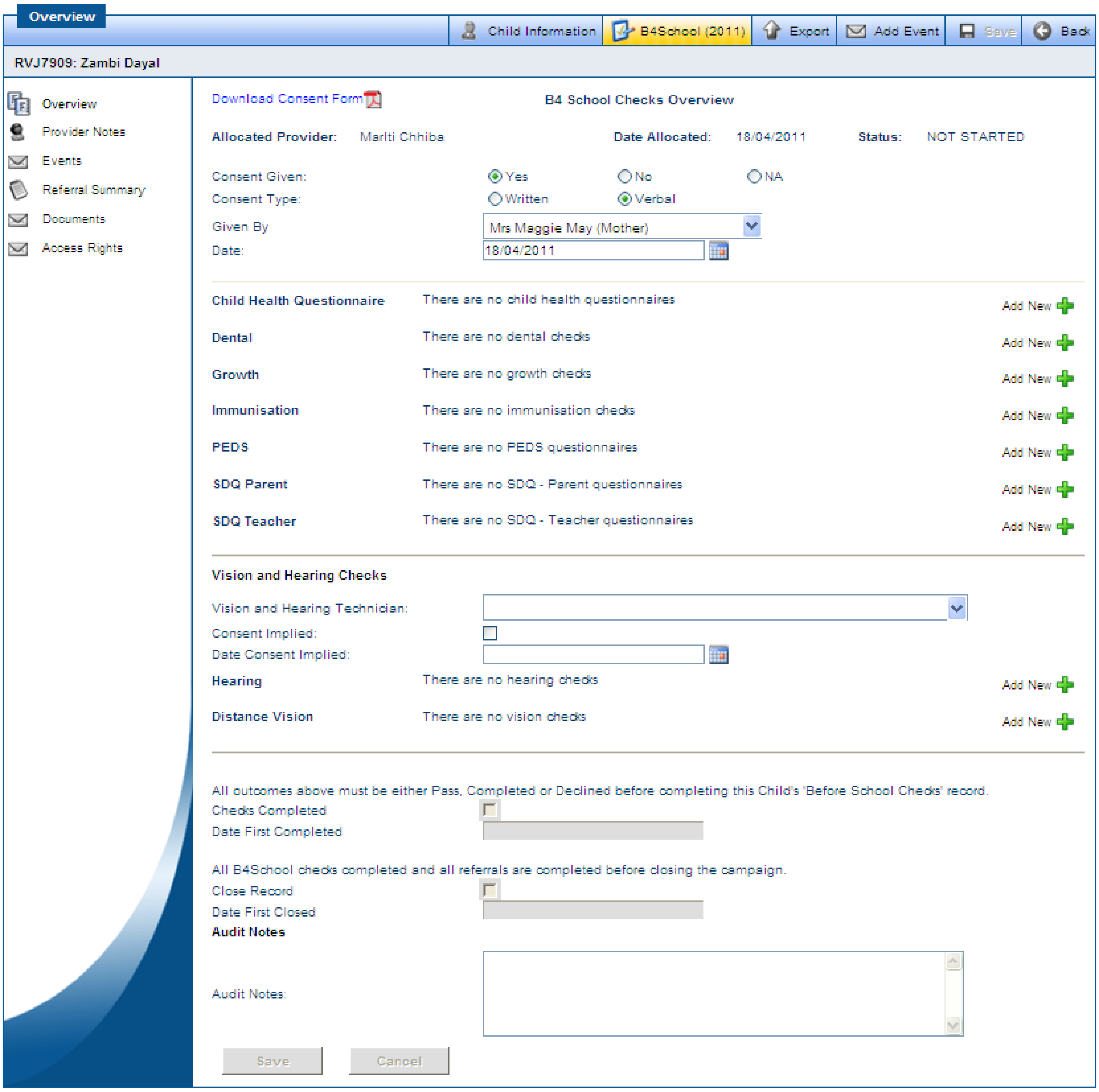


Figure 22 Consent Details Screen - Completed

Note

A provider can only complete the Check, if they are noted as the provider, or are a coordinator.

10.2 View a completed B4 School Check with outstanding referrals

1. **Login** as a Provider
2. **Search** for the child to review
3. **Click** the child's name. The **Child Information** screen should be displayed. If another screen is displayed, click on the Child Information 

tab.
4. Click the "B4School (YYYY)" 

tab. The overview screen will be displayed.

   Outstanding Referrals are shown on the Overview Screen as **'Outcome: Referred'.** You can also see a **list of all Referrals** that this child has had by clicking the Referral Summary in the Left Panel.

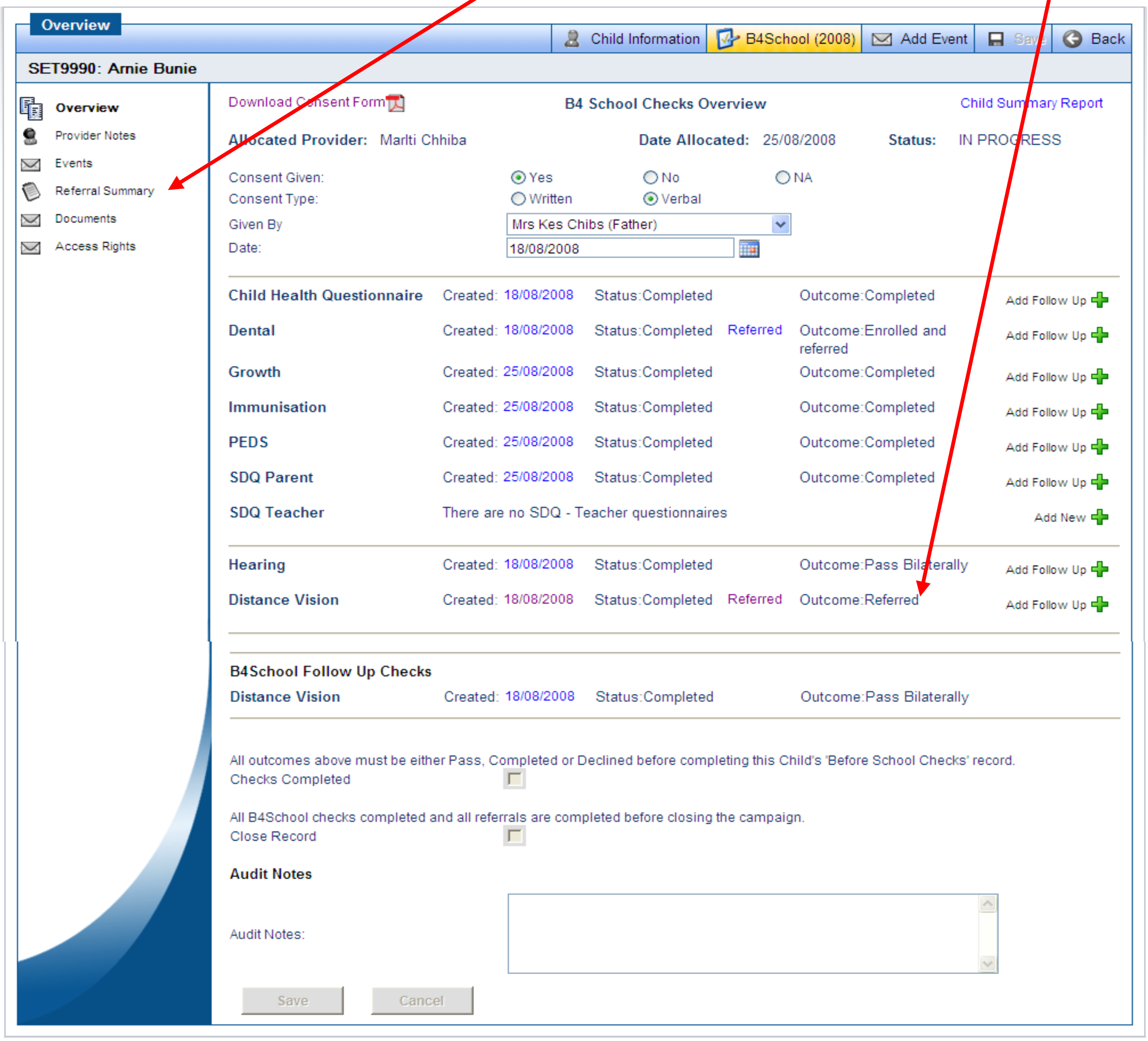


Figure 23 Overview Screen

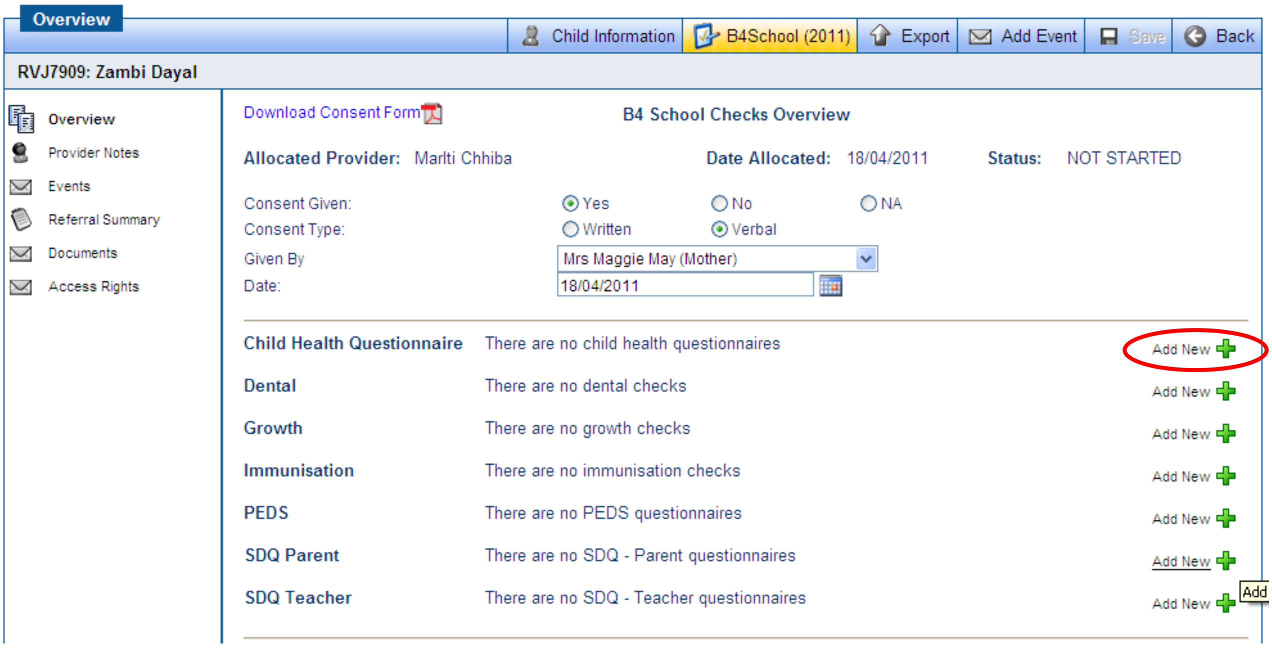
ENTERING THE CHECK RESULTS

11 CHILD HEALTH QUESTIONNAIRE (CHQ)

This component documents general information on the child's health, and highlights any current concerns requiring further investigation **from the caregiver's perspective**.

Undertaking the Child Health Questionnaire

1. **Click** on "B4School (YYYY)" B4School (2011) tab
2. Click the **Add New link** (Add New **)** on the right of the "B4 School Check Overview" screen (circled below)



The Child Health Questionnaire screen will appear (refer next page for screen shot):

3. **Enter** details of the checks

   For further information also see Field Descriptions for Child Health Questionnaire (CHQ) on Page 43, to assist you in filling in the questionnaire.

4. Click **Save** when finished

Sample: Child Health Questionnaire

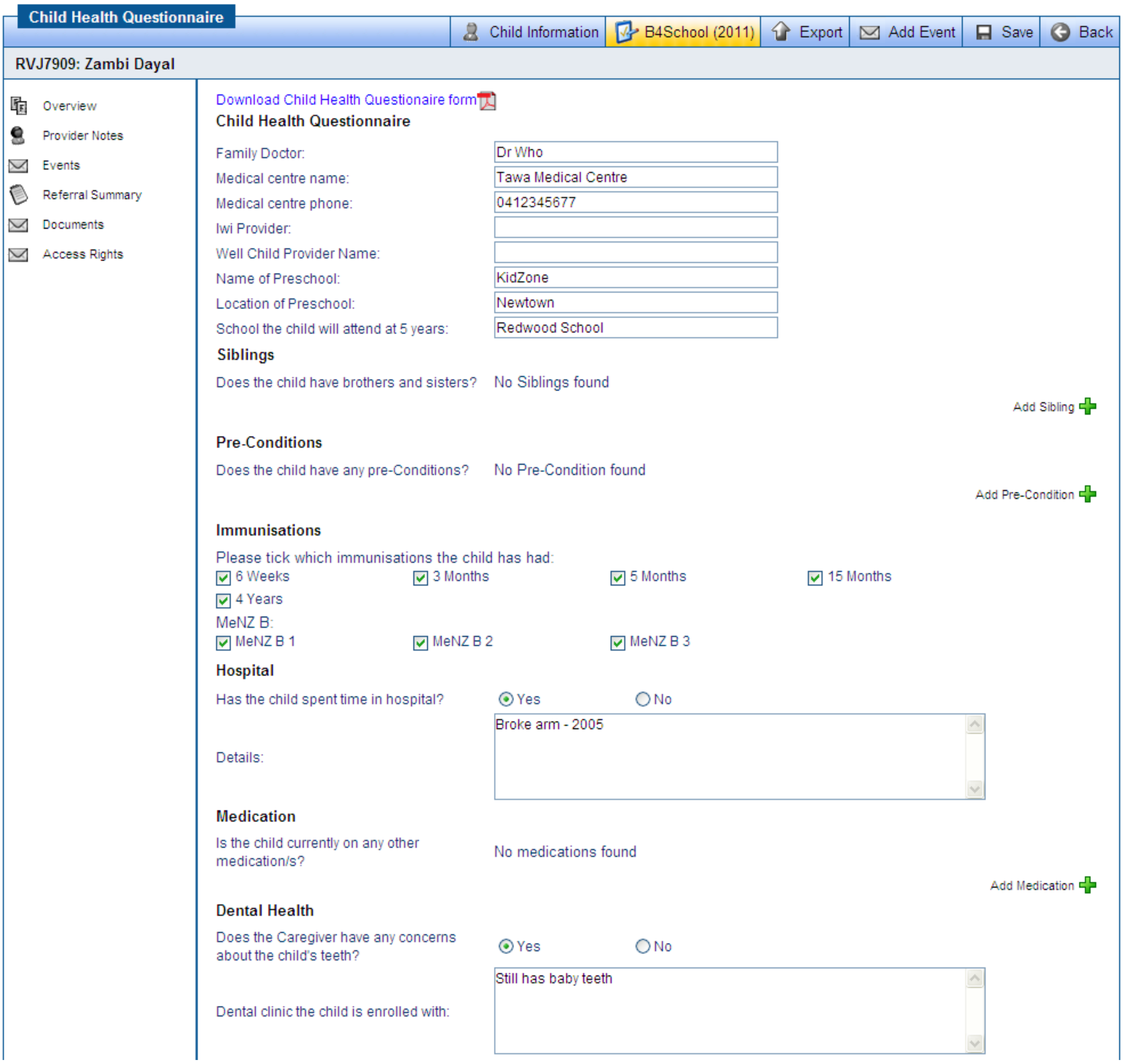


Figure 24 Child Health Questionnaire Screen – 1 of 2

The Child Health Questionnaire screen above is continued on the next page…

Sample: Child Health Questionnaire - continued

The Child Health Questionnaire screen below is continued from the previous page.

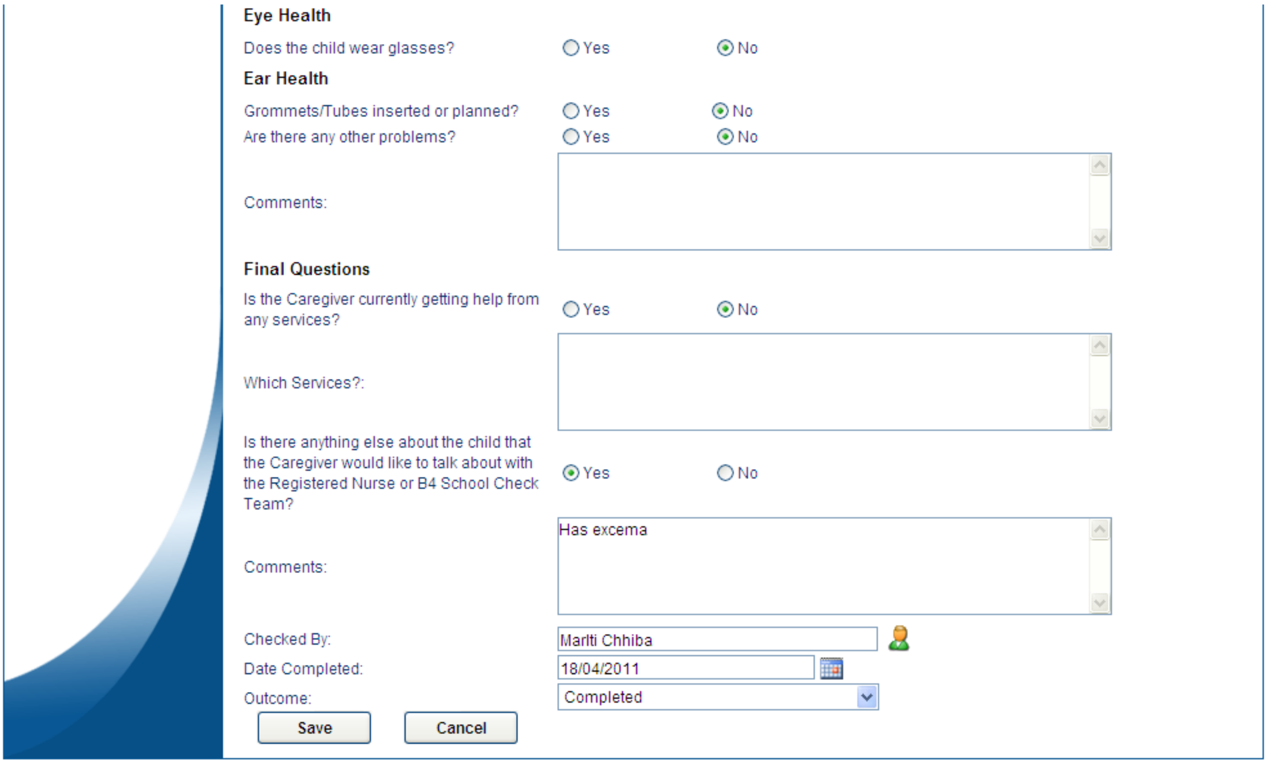


Figure 25 Child Health Questionnaire Screen – 2 of 2

Add Sibling

1. **Click** the Add Sibling link (Add Sibling ➕). This will open a section of the CHQ screen to add siblings for the child.
2. **Add** details of the sibling

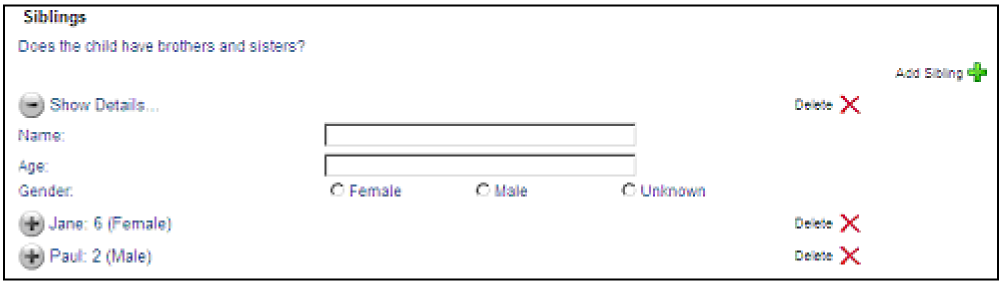


Figure 26 Sibling Screen

3. Either tab to the next question on the CHQ screen, or click Save at the bottom of the CHQ screen. The Overview screen will be displayed if the Save button is clicked.
4. To delete the details the new sibling details window, or to delete previously entered siblings, click the Delete icon (Delete ✕) next to the entry to be deleted.

Note

The age of a sibling can only be entered as a whole number. If the sibling is not yet one year old, then enter the age as 0.

Add Pre-conditions

1. **Click** the Add Pre-Condition link (Add Pre-Condition). This will open a section of the CHQ screen to add any pre-conditions the child may have.

2. **Add** details of the pre-condition

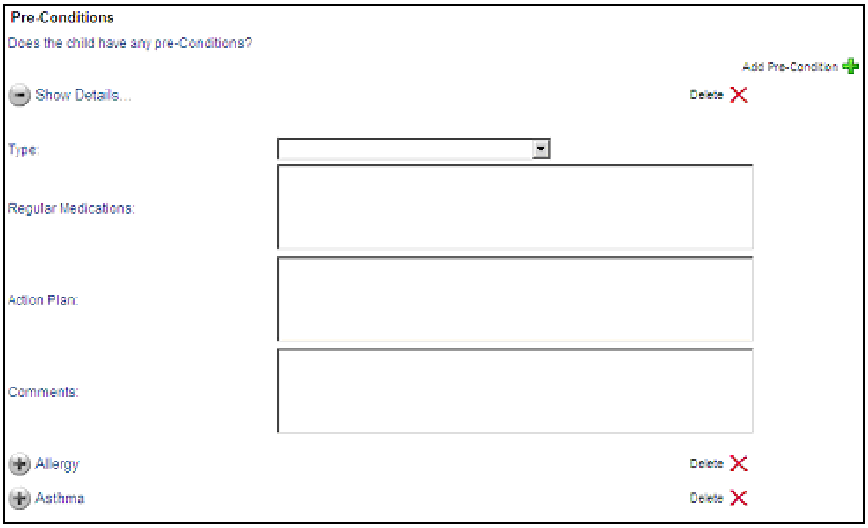


Figure 27 Preconditions Screen

3. Either tab to the next question on the CHQ screen, or click Save at the bottom of the CHQ screen. The Overview screen will be displayed if the Save button is clicked.

4. To delete the details of any pre-conditions, click the Delete icon (Delete) next to the entry to be deleted.

Add Medication

1. **Click** the Add Medication link (Add Medication). This will open a section of the CHQ screen to add medication.

2. **Add** details of the medication

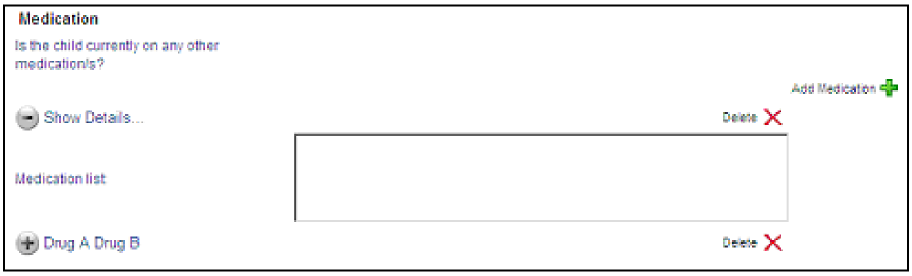


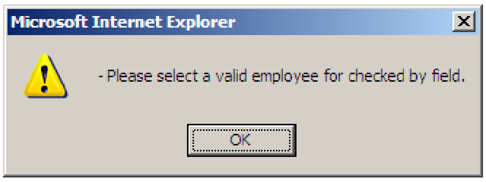
Figure 28 Medication Screen

3. Either tab to the next question on the CHQ screen, or click Save at the bottom of the CHQ screen. The Overview screen will be displayed if the Save button is clicked.

4. To delete the details new medication details window, or to delete previously entered medication, click the Delete icon (Delete) next to the entry to be deleted.

Field Descriptions for Child Health Questionnaire (CHQ)

To complete the CHQ, the user must enter the following details:

Field Name	Description
Entered by:	Name of the person who entered the check results into the B4SC IS. This appears once the CHQ screen is filled in and saved, if different from the person who completed the check (see below).
Checked by:	**Important** **Name of the person who performed the checks, <u>not</u> the name of the data entry person.** **The checked by person can be different for different components of the check e.g.: nurse, hearing and vision technician etc.** Enter a "Checked by" name manually or click the icon to automatically input the name of the user logged into the system. An exact name must be entered otherwise the following error will appear: 
Date Completed:	Date the check was completed
Outcome:	**Declined:** Check cannot be done. Child or caregiver chose not to answer the questionnaire **Completed:** Check completed. All details added to the B4SC IS. No issues and nothing outstanding. **Referred:** Child is referred for further services. Does not mean a confirmed appointment. For further information on referrals, see Referrals on Page 73 and Referral Rules and Field Descriptions on Page 75.

DENTAL CHECK

The B4SC includes promoting oral health to parents and doing the 'lift the lip' check of dental decay in children. It is also an opportunity to check that children are enrolled with their local dental service.

1. **Click** the "B4School (YYYY)" button B4School (2011)
2. **Click** the Add New link (Add New) to the right of the Dental Check heading
3. **Enter** the relevant information.

   For further information also see [Field Descriptions for Dental Check on Page 45.](#)

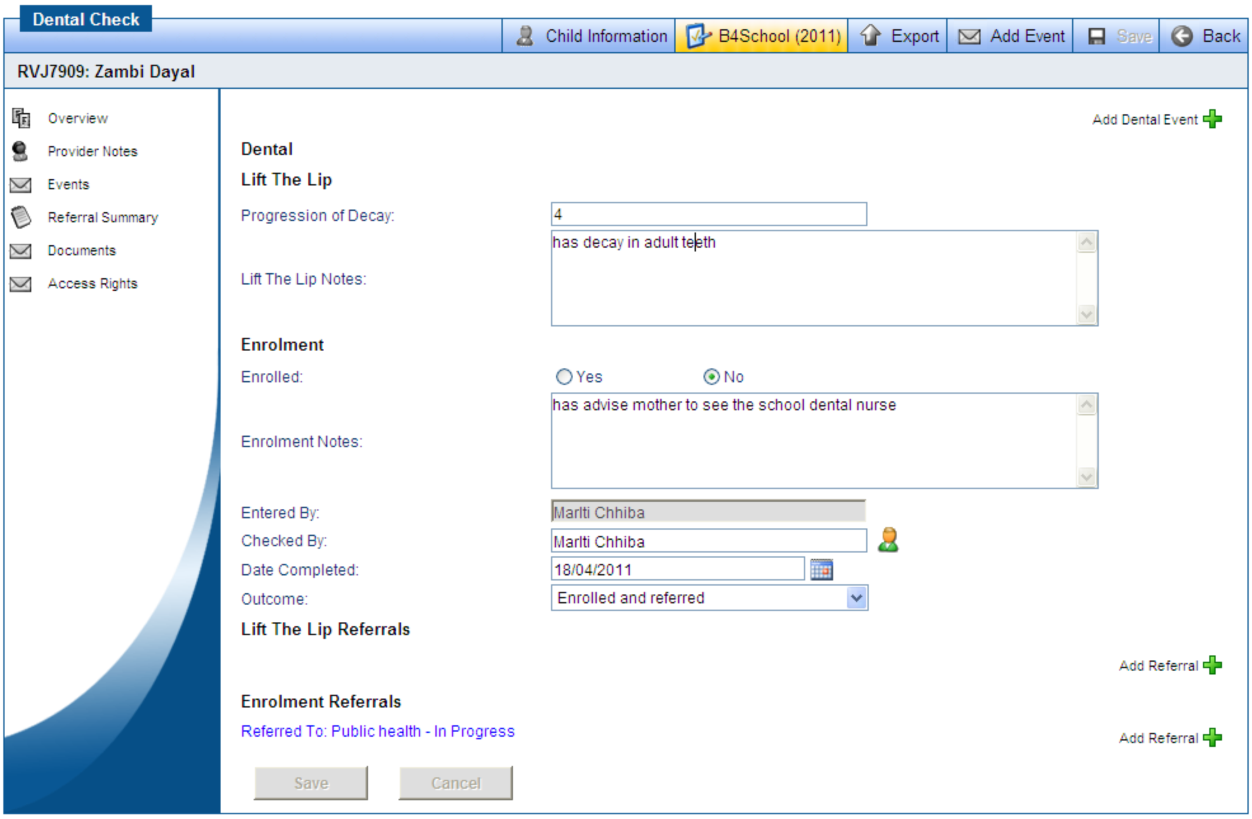


Figure 29 Dental Screen

4. Click **Save** when finished

Field Descriptions for Dental Check

Field Name	Description
Additional Resource:	The B4SC, A Handbook for Practitioners - Oral Health Screening and Promotion section on Page 25.
Progression of Decay:	Grading: 1-6 progression. Good to Bad **Decay 6** must be referred. This will prompt for a Referral screen
Lift the Lip Notes:	Write notes relating to observations (e.g. describe observed decay).
Enrolment:	If a child has no dental issues, and simply needs to be enrolled, you do not have to do a referral. Therefore you will tick 'No' in the 'Enrolled' field, and pick 'Enrolled' as the 'Outcome'. The nurse needs to ensure they enrol the child, but does not need to do a referral. If the child has issues and needs a referral, the user should select; • 'Enrolled and referred' • if the child also isn't enrolled or • 'Referred' if already enrolled. See Outcome below.
Enrolment Notes:	If child is already enrolled with a dental service, enter of dental service.
Entered by:	Name of the person who entered the details into the B4SC IS, if different from the person who completed the check in ''Check By'' (see below)
Checked by:	**Important** **Name of the person who performed the dental check.** **Enter a name manually or click the icon – This is the name of the person who performed the check and signed on the form, and <u>not</u> the data entry person. The checked by person can be different for different checks for the same child e.g. nurse, ear and vision technician etc.**
Date Completed:	Date the check was completed.

Field Name	Description
Outcome:	The Outcome for the dental check is different to the outcomes for other checks. **Declined:** Check cannot be done. Child or parent is unwilling/uncooperative **Completed:** Check completed. No issues and nothing outstanding. **Enrolled:** Child does not need a referral, but has been sent for enrolment with a dental clinic as previously was not enrolled. This outcome completes the check. **Referred:** Child is referred for further services **Enrolled & Referred:** Child sent for enrolment with a dental clinic, and also needed to be referred. For further information on referrals, see Referrals on Page 73 and Referral Rules and Field Descriptions on Page 75.

12 GROWTH (HEIGHT AND WEIGHT)

Purpose of Height and Weight Monitoring

A Child’s growth is captured in the system by capturing a child’s height and weight. Providers use this to identify a child’s BMI.

Undertaking the Growth Check

1. Click “B4School (YYYY)” button B4School (2011)
2. Click on the Add New link (Add New) to the right of the Growth Check heading
3. Enter the relevant information:

   Height: Enter numbers only, in **cm**.

   Weight: Enter numbers only, in **kg**.

   For further information also see Field Descriptions for Growth Check on Page 48.
4. Click **Save** when finished

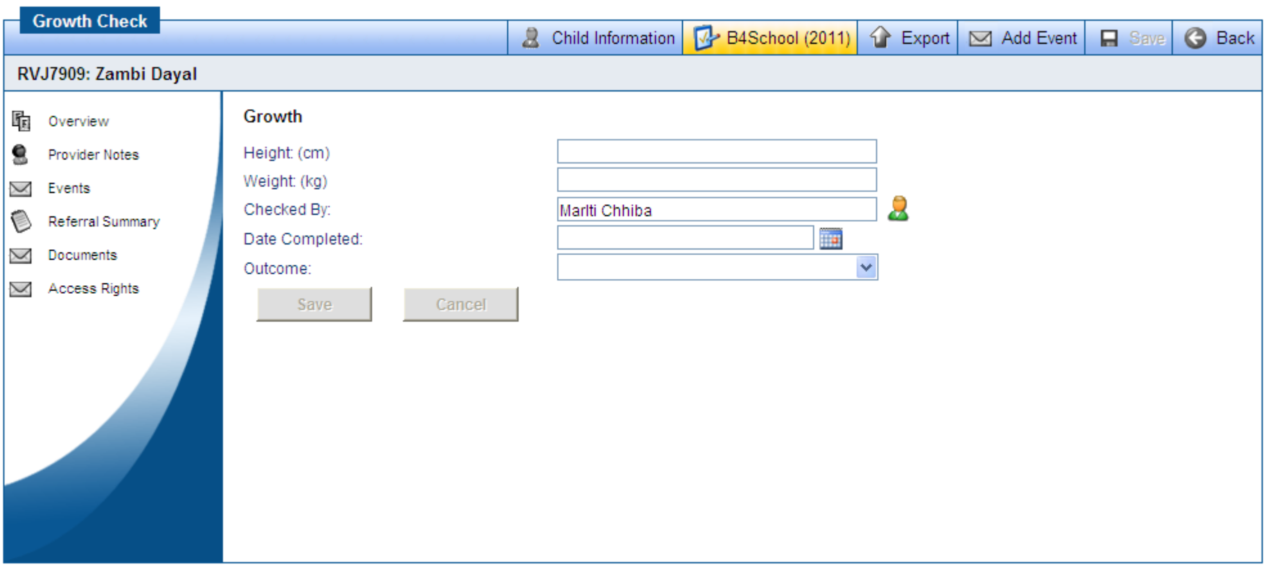


Figure 30 Growth Screen

Field Descriptions for Growth Check

Field Name	**Description**
Additional Resource:	The B4SC, A Handbook for Practitioners - Growth Measurement and Monitoring section on Page 42.
Entered by:	Name of the person who entered the details into the B4SC IS, if different from the person who completed the check in ''Check By'' (see below)
Checked by:	**Important** **Name of the person who performed the growth check.** **Enter a name manually or click the icon – This is the name of the person who performed the check and signed on the form, and not the data entry person. The checked by person can be different for different checks for the same child e.g. nurse, ear and vision technician etc.**
Date Completed:	Date the check was completed.
Outcome:	**Declined:** Check cannot be done. Child or parent is unwilling/uncooperative **Completed:** Check completed. No issues and nothing outstanding. **Referred:** Child is referred for further services. Does not mean a confirmed appointment. For further information on referrals, see Referrals on Page 73 and Referral Rules and Field Descriptions on Page 75.

13 IMMUNISATION CHECK

The B4SC provides a checklist for a child's immunisations. This is also an opportunity to give or refer for any of the scheduled immunisations that the child has missed. This is to establish overall immunisations, not individual vaccinations.

National Immunisation Register (NIR)

The immunisation check involves looking up the child's routine childhood vaccine schedule records on the NIR before performing this immunisation check. The NIR contains data for children born after January 2005. Only practitioners with access to the NIR can confirm a child's immunisation status, and determine whether the child requires immunisation as part of the immunisation check.

1. Click the "B4School (YYYY)" button B4School (2011)
2. Click on the **Add New link** (Add New) to the right of the Immunisation heading
3. Look up the child's routine childhood vaccine schedule records on the NIR
4. Practitioners who do not have access to NIR can complete the immunisation status based on the caregiver's knowledge of the child's immunisation status.
5. Enter the details for each Immunisation. For further information also see Field Descriptions for Immunisation Check on Page 50.
6. Options for each immunisation are:

Field Options	Description
Blank	Child has not yet received immunisation
Partial	Child has had part of the immunisation
Decline	Child's caregiver opted not to have the immunisation
Completed	Child has had the immunisation

7. Click **Save** when finished

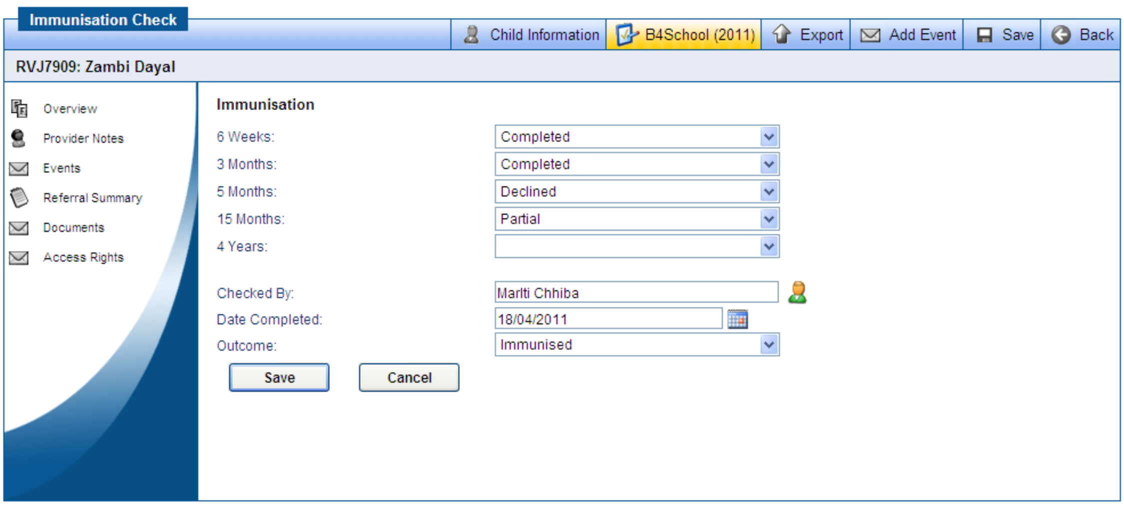


Figure 31 Immunisation Screen

Field Descriptions for Immunisation Check

Field Name	Description
Entered by:	Name of the person who entered the details into the B4SC IS, if different from the person who completed the check in ''Check By'' (see below)
Checked by:	**Important** **Name of the person who performed the Immunisation check.** **Enter a name manually or click the icon – This is the name of the person who performed the check and signed on the form, and not the data entry person. The checked by person can be different for different checks for the same child e.g. nurse, ear and vision technician etc.**
Date Completed:	Date the check was completed.
Outcome:	**Completed:** Check completed. All immunisations are up to date. No issues and nothing outstanding. **Declined:** Check cannot be done. Child or parent is unwilling/uncooperative **Immunised:** Immunisation is undertaken at time of check, if the provider is allowed to give them (i.e. not referred to anyone) **Referred:** Four year old check has not been done. Child is referred for further services. Does not mean a confirmed appointment. For further information on referrals, see Referrals on Page 73 and Referral Rules and Field Descriptions on Page 75.

14 PARENTAL EVALUATION OF DEVELOPMENT STATUS (PEDS)

PEDS is a questionnaire for parents/caregivers relating to a child's development.

1. **Click** "B4School (YYYY)" button B4School (2011)
2. Click on the **Add New** link (Add New) to the right of the PEDS heading
3. Download the PEDS Form from the QuickPlace site http://www2.moh.govt.nz/b4schools.

   For further information also see Field Descriptions for PEDS on Page 54.
4. To complete the Shaded and Unshaded Score fields;

   Complete the Score Form in Appendix 8 of the Handbook for Practitioners (Parental Evaluation of Developmental Status: Score Form).

   Count the number of ticks for the shaded and unshaded boxes (on the Score Form).

   Enter these numbers into the respective fields on the B4SC IS screen.
5. Practitioners will use Appendix 8 and 9 (of the Handbook for Practitioners) to identify the PEDS Pathway. The pathway should be entered into the **PEDS Pathway Type** field.
6. Click **Save** when finished

14.1 Sample: PEDS Screen

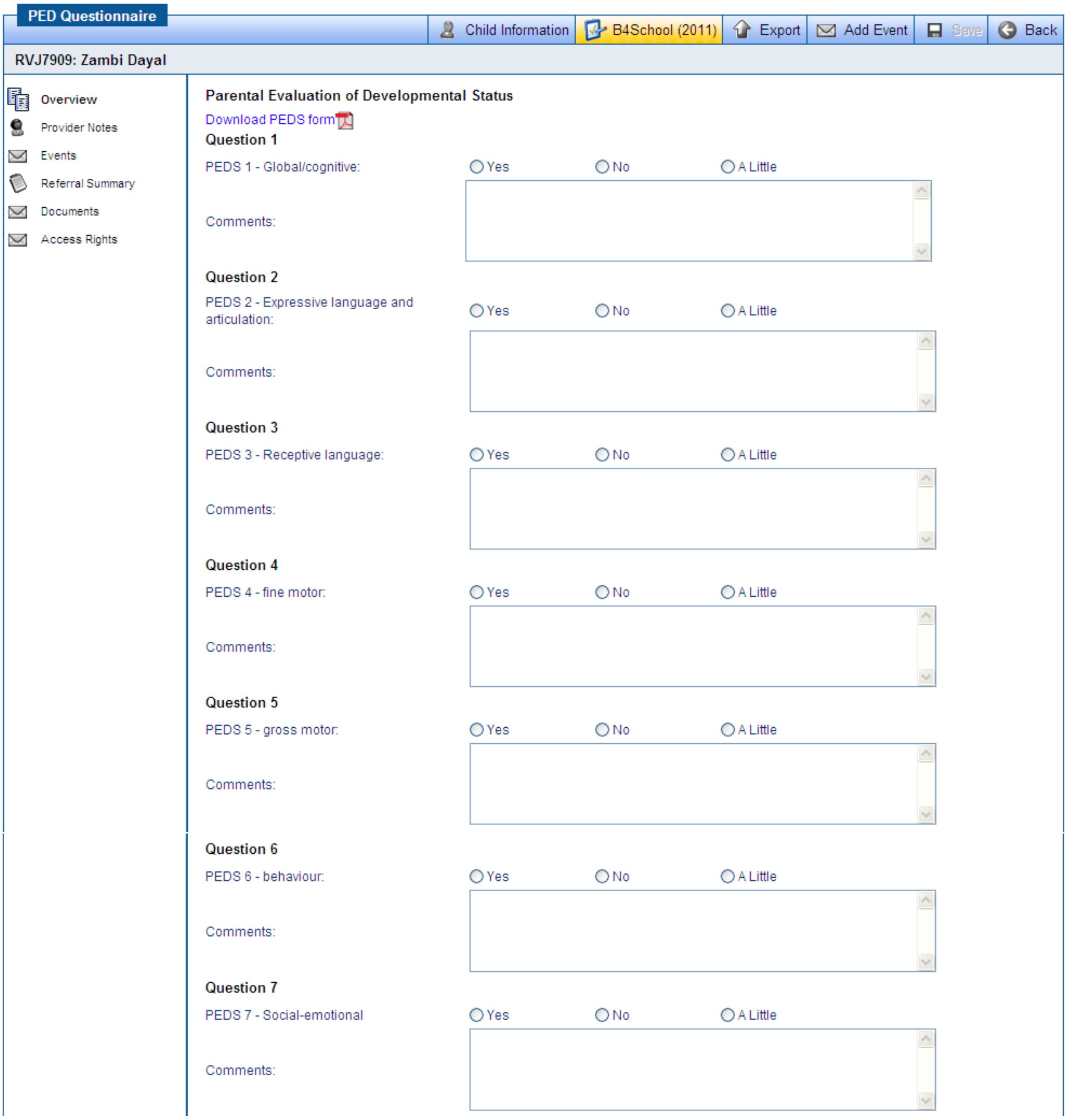


Figure 32 PEDS Screen - 1 of 2

The PEDs Questionnaire screen above is continued on the next page…

The PEDs Questionnaire screen below is continued from the previous page.

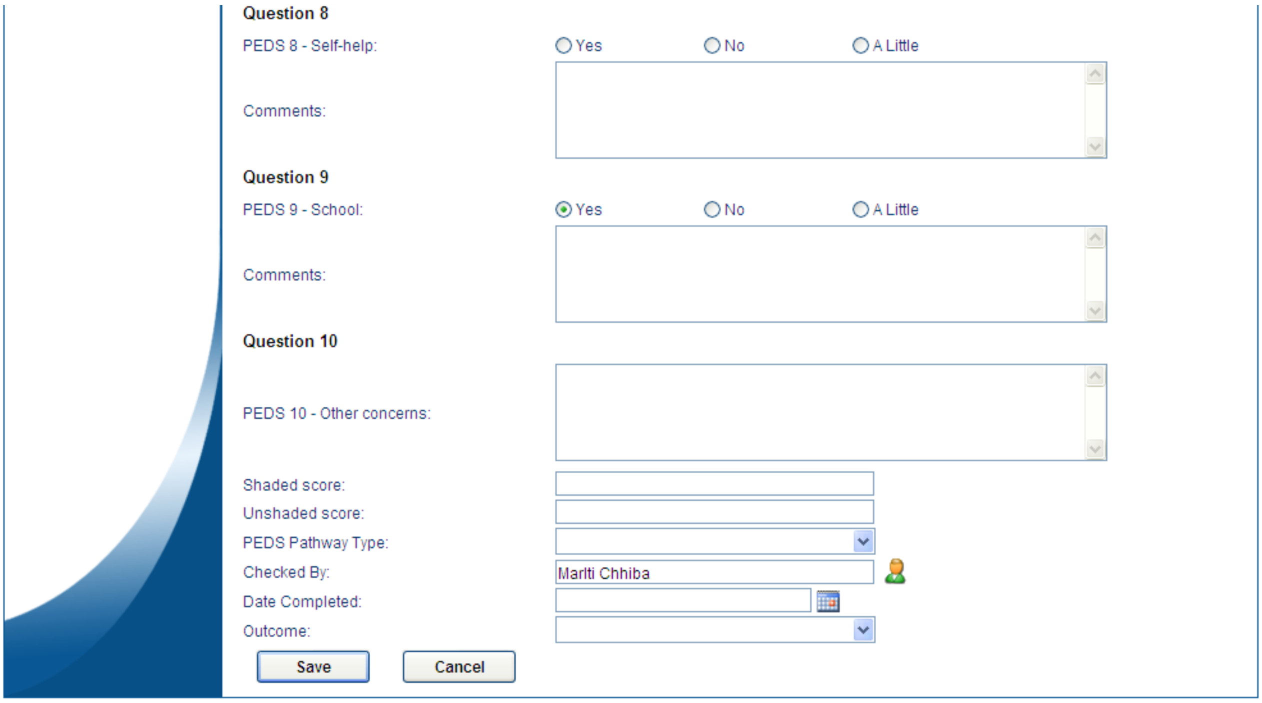


Figure 33 PEDS Screen – 2 of 2

14.2 Printing PEDs

1. To print a PEDS Report, Click the Child PEDS Report link

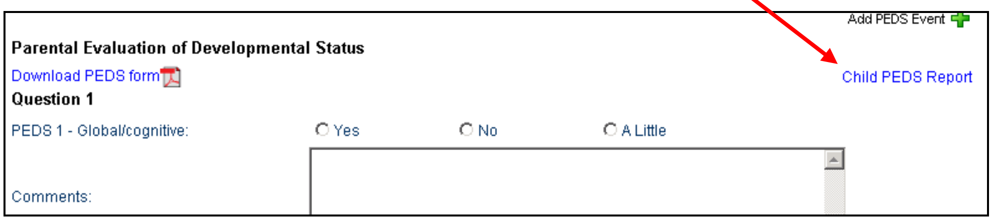
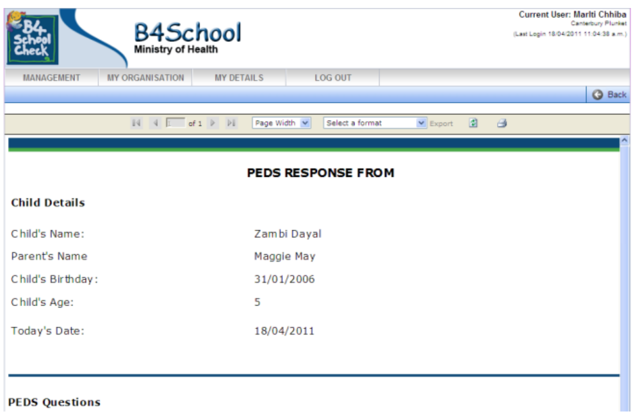


Figure 34 PEDS Report Link – Printing PEDS

2. Click the Print button above the PEDS Response Form. 

Sample of Printed PEDS



Field Descriptions for PEDS

Field Name	Description
Entered by:	Name of the person who entered the details into the B4SC IS, if different from the person who completed the check in ''Check By'' (see below)
Checked by:	**Important** **Name of the person who performed the PEDS check.** **Enter a name manually or click the icon – This is the name of the person who performed the check and signed on the form, and not the data entry person. The checked by person can be different for different checks for the same child e.g. nurse, ear and vision technician etc.**
Date Completed:	Date the check was completed.
Outcome:	**Completed:** PEDS Form has been completed. No issues and nothing outstanding. **Declined:** Check cannot be done. Caregiver declined to fill in PEDS form. **Referred:** Child is referred for further services. Does not mean a confirmed appointment. For further information on referrals, see Referrals on Page 73 and Referral Rules and Field Descriptions on Page 75.

Additional Resources:

The B4SC: A Handbook for Practitioners:

Parental Evaluation of Developmental Status, Page 36.

Appendix 7: Parental Evaluation of Developmental Status: Parent Response Form, Page 66.

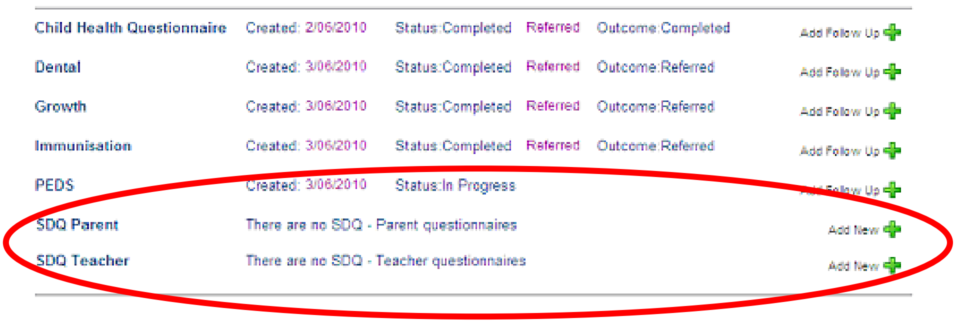
Appendix 8: Parental Evaluation of Developmental Status: Score Form, Page 67.

Appendix 9: Parental Evaluation of Developmental Status: Interpretation Form, Page 68.

15 STRENGTHS AND DIFFICULTIES QUESTIONNAIRE (SDQ)

Children often reach primary school with undetected or untreated developmental or behavioural problems. Evidence shows that parents and teachers can accurately identify children with socio-emotional and mental health problems.

In the B4SC IS, there are two SDQs; one for parents/caregivers, and one for teachers (refer Overview screen below). The SDQ used is very similar for both parents and teachers.



Child Health Questionnaire	Created: 2/06/2010	Status:Completed	Referred	Outcome:Completed	Add Follow Up
Dental	Created: 3/06/2010	Status:Completed	Referred	Outcome:Referred	Add Follow Up
Growth	Created: 3/06/2010	Status:Completed	Referred	Outcome:Referred	Add Follow Up
Immunisation	Created: 3/06/2010	Status:Completed	Referred	Outcome:Referred	Add Follow Up
PEDS	Created: 3/06/2010	Status:In Progress			Add Follow Up
SDQ Parent	There are no SDQ - Parent questionnaires				Add New
SDQ Teacher	There are no SDQ - Teacher questionnaires				Add New

The screens for these are similar, except that the input is from the two sources. The Teacher screen has an additional "Not Applicable" outcome option where there is no teacher.

1. Click "B4School (YYYY)" button B4School (2011)
2. Click on the **Add New** link (Add New) to the right of the SDQ Parent or SDQ Teacher heading. The screen on the next page will appear.
3. **Download** SDQ Form by clicking the link Download Parent form at the top left of the screen. On the Teachers SDQ screen, the link states "Download Teacher form").

   The forms are also available from appendices in the handbook for practitioners.

   For further information also see Field Descriptions for SDQ on Page 57.

Note

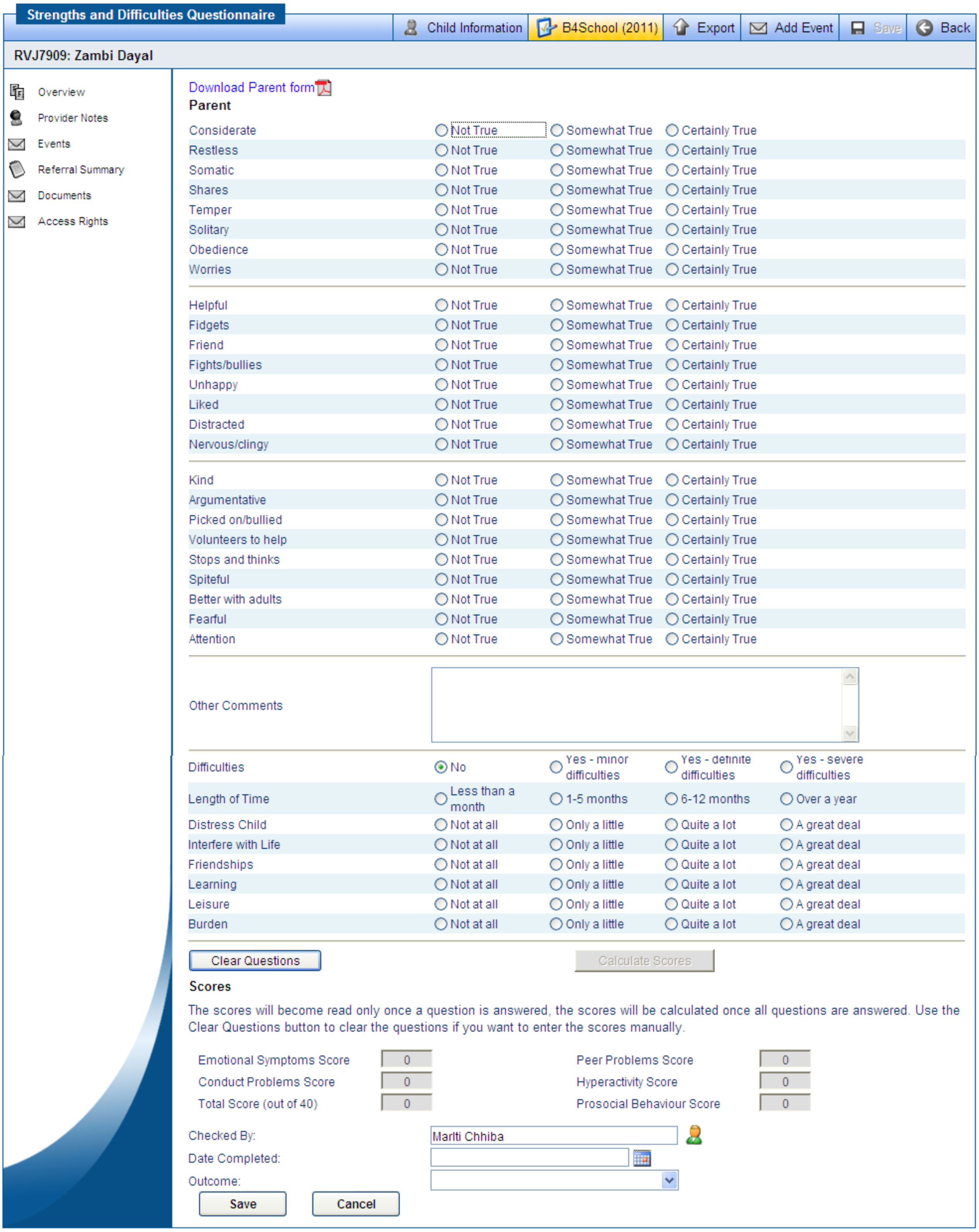
The Parent and Teacher SDQ forms have the same questions, with some variations.

4. **Record scores**. All questions above the "Other Comments" field must be entered.

   If the Difficulties question is answered "No", the "Calculate Scores" button will become available for clicking.

   If the Difficulties question is anything other than "No", the remainder questions must be entered before the "Calculate Scores" button becomes available.
5. Click the Calculate Scores button (Calculate Scores) to Calculate the SDQ scores. When all questions have been scored, the Calculate Scores button will be available to click. Click **Save** when finished.

15.1 Sample: SDQ - P



Strengths and Difficulties Questionnaire

Child Information | B4School (2011) | Export | Add Event | Save | Back

RVJ7909: Zambi Dayal

- Overview
- Provider Notes
- Events
- Referral Summary
- Documents
- Access Rights

Download Parent form

Parent

Considerate	Not True	Somewhat True	Certainly True
Restless	Not True	Somewhat True	Certainly True
Somatic	Not True	Somewhat True	Certainly True
Shares	Not True	Somewhat True	Certainly True
Temper	Not True	Somewhat True	Certainly True
Solitary	Not True	Somewhat True	Certainly True
Obedience	Not True	Somewhat True	Certainly True
Worries	Not True	Somewhat True	Certainly True
Helpful	Not True	Somewhat True	Certainly True
Fidgets	Not True	Somewhat True	Certainly True
Friend	Not True	Somewhat True	Certainly True
Fights/bullies	Not True	Somewhat True	Certainly True
Unhappy	Not True	Somewhat True	Certainly True
Liked	Not True	Somewhat True	Certainly True
Distracted	Not True	Somewhat True	Certainly True
Nervous/clingy	Not True	Somewhat True	Certainly True
Kind	Not True	Somewhat True	Certainly True
Argumentative	Not True	Somewhat True	Certainly True
Picked on/bullied	Not True	Somewhat True	Certainly True
Volunteers to help	Not True	Somewhat True	Certainly True
Stops and thinks	Not True	Somewhat True	Certainly True
Spiteful	Not True	Somewhat True	Certainly True
Better with adults	Not True	Somewhat True	Certainly True
Fearful	Not True	Somewhat True	Certainly True
Attention	Not True	Somewhat True	Certainly True

Other Comments

Difficulties	No	Yes - minor difficulties	Yes - definite difficulties	Yes - severe difficulties
Length of Time	Less than a month	1-5 months	6-12 months	Over a year
Distress Child	Not at all	Only a little	Quite a lot	A great deal
Interfere with Life	Not at all	Only a little	Quite a lot	A great deal
Friendships	Not at all	Only a little	Quite a lot	A great deal
Learning	Not at all	Only a little	Quite a lot	A great deal
Leisure	Not at all	Only a little	Quite a lot	A great deal
Burden	Not at all	Only a little	Quite a lot	A great deal

Clear Questions | Calculate Scores

Scores

The scores will become read only once a question is answered, the scores will be calculated once all questions are answered. Use the Clear Questions button to clear the questions if you want to enter the scores manually.

Emotional Symptoms Score	0	Peer Problems Score	0
Conduct Problems Score	0	Hyperactivity Score	0
Total Score (out of 40)	0	Prosocial Behaviour Score	0

Checked By: Marlti Chhiba

Date Completed:

Outcome:

Save | Cancel

Figure 35 Strengths and Difficulties Questionnaire

Field Descriptions for SDQ

Field Name	Description
Entered by:	Name of the person who entered the details into the B4SC IS, if different from the person who completed the check in ''Check By'' (see below)
Checked by:	**Important** **Name of the person who performed the SDQ check.** **Enter a name manually or click the icon – This is the name of the person who performed the check and signed on the form, and <u>not</u> the data entry person. The checked by person can be different for different checks for the same child e.g. nurse, ear and vision technician etc.**
Date Completed:	Date the check was completed.
Outcome:	**Completed:** SDQ Form has been completed. No issues and nothing outstanding. **Declined:** Check cannot be done. Caregiver/teacher declined to fill in SDQ form. **Referred:** Child is referred for further services. Does not mean a confirmed appointment. For further information on referrals, see Referrals on Page 73 and Referral Rules and Field Descriptions on Page 75 **Not Applicable:** Only appears on SDQ Teacher screen. Use if the child does not have a 'Teacher'.

Additional Resources:

The B4SC: A Handbook for Practitioners:

Identifying Developmental and Behavioural Problems, Page 27.

Appendix 4: Strengths and Difficulties Questionnaire for Parent of Three or Four-Year Old, Page 60.

Appendix 5: Strengths and Difficulties Questionnaire for Teacher of Three or Four-Year Old, Page 62.

Appendix 6: Scoring the Informant-Rated Strengths and Difficulties Questionnaire, Page 64.

16 VHT FUNCTION – VISION AND HEARING SCREENING

A Vision and Hearing Technician (VHT), or user with VHT access, can record vision and hearing screening results in the B4SC IS.

16.1 Entering vision and hearing results prior to full consent

Vision and hearing screening may be completed in isolation to the rest of the B4SC checks. The vision and hearing results can be entered into the B4SC IS before the full consent is obtained.

Before VHTs can complete the screen, caregivers must be sent a letter to explain that the screening is happening and that the results will be entered into the B4SC IS. The specific wording for the caregiver letter must be:

> *"Your child's name, date of birth, ethnicity and National Health Index (NHI) number will be recorded by the Vision and Hearing Technician and stored in the B4SC information system, along with the results of the Check. This information can only be used by authorised people working with your child and are co-ordinating the B4SC, or who are managing the system. The results of the test will be given to your child's early childhood education centre, kohanga reo, and/or school. B4SC information system is held in accordance to B4SC information system privacy policy. For more information on the policy see http://www.moh.govt.nz/b4schoolcheck.*
>
> *You have the right under the Privacy Act to make a complaint to the Privacy Commissioner in relation to the storage and use of the B4SC information system."*

VHT process

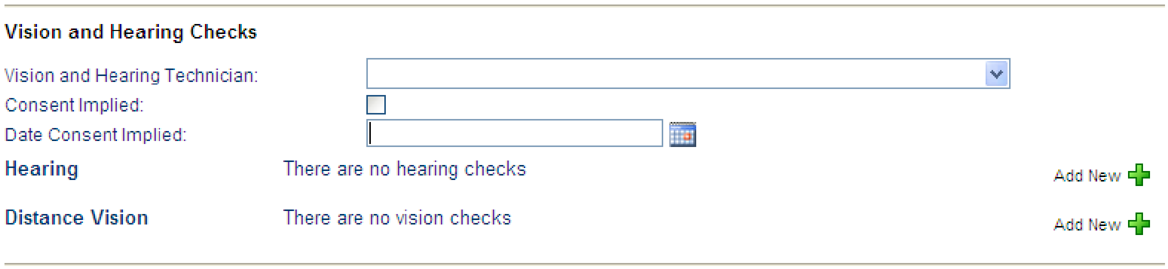
1. Log into the B4SC IS.
2. **Locate** a child to screen (refer to the search section). If the child has not been assigned to a provider, click the Assign Provider link and assign the child to a VHT from the dropdown list of technicians (this only allows VHT access to the vision and hearing checks).

> **Note**
>
> **The VHT will not show as the main provider for the child, and the VHT does not need to reallocate the child back to the coordinator when finished.**
>
> **The VHT filtering has not been changed, the child will still be visible in the VHT's list until they are no longer the VHT or the childs B4SC status is set to closed. The VHT will be able to filter out children that have the completed status like all other providers.**

3. **Click** the child's name to open the record and see the Child Information page.
4. **Click** the "B4School (YYYY)" button 

. This will display the Overview screen.

5. **Scroll** to the Vision and Hearing Checks section.



If results are being entered on behalf of another VHT, select them from the list of technicians. If the technician is not listed, ask the Coordinator to add the VHT as a user in the B4SC IS.

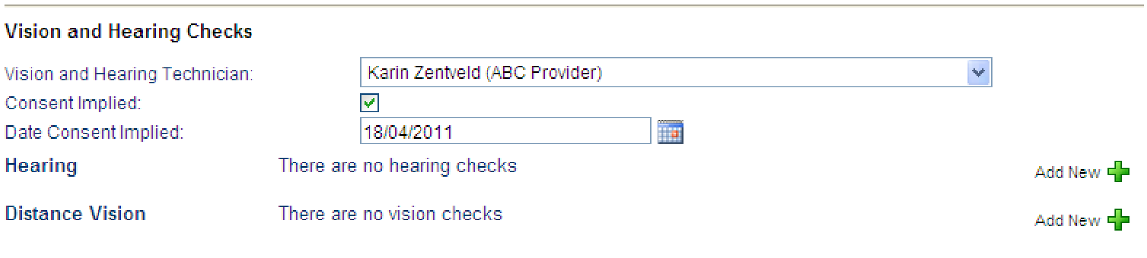
Note: Only complete the next steps if consent has not been given for the Check as a whole.

6. **Click** the "**Consent Implied**" check box.

This indicates that the correct process has been followed to inform the caregiver that the check would be done and that the results will be stored in the information system.

7. Set the "**Date Consent Implied**" to the date the check was performed, unless there is a specific known date when the consent was obtained from the caregiver.

8. Click **Save**, either in the top right of the window, or at the bottom.



9. **Add** results for the vision and hearing tests (click the Add New links).

For further information also see:

Vision and Hearing – Hearing Check on Page 60.

Field Descriptions for Hearing Check on Page 61.

Vision and Hearing – Vision Check on Page 62.

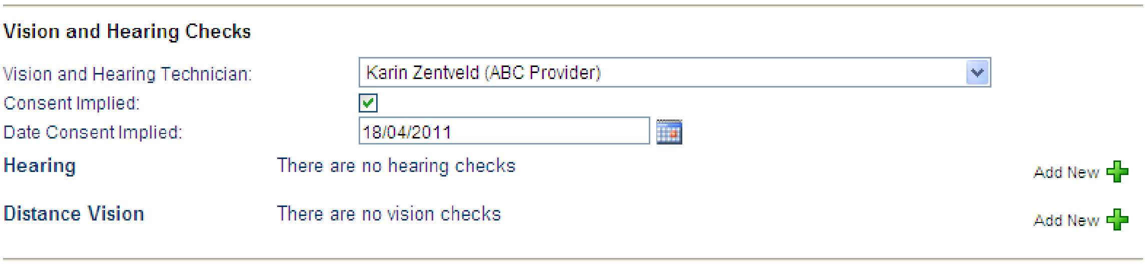
Field Descriptions for Vision Check on Page 63.

Tip

Unless changes are made to the child's overview page, there's no need to save again. Simply click either the Management or Allocation tab in the top left of the screen to return to the Child Search page.

16.2 Vision and Hearing – Hearing Check

1. **Click** "B4School (YYYY)" button  to open the Overview screen. The Vision and Hearing Checks section is below the Questionnaire section (page down to view).



2. Click the **Add New** link () to the right of the Hearing heading. The following screen will appear.

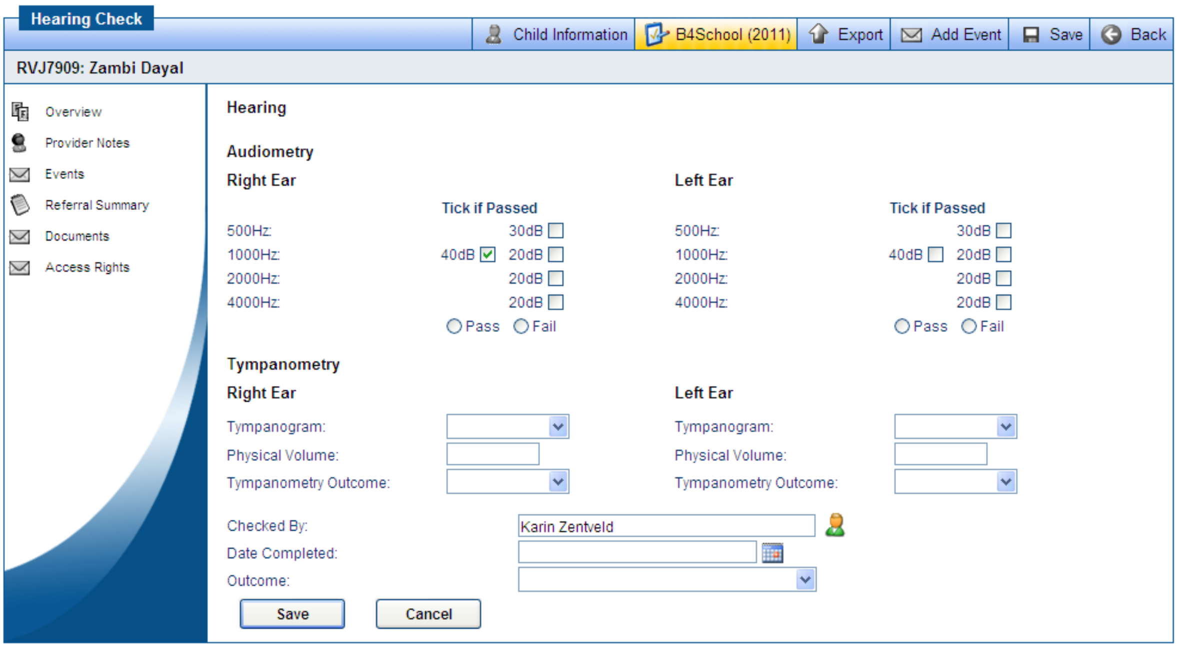


Figure 36 Hearing - Updated Screen

3. Record all test results. All results must be entered for both **Audiometry** and **Tympanometry** (if done). The tick boxes should only be checked if a child passes at that level.

   For more information see Field Descriptions for Hearing Check on Page 61.

4. Click **Save** when finished

Field Descriptions for Hearing Check

Field Name	Description
Entered by:	Name of the person who entered the details into the B4SC IS, if different from the person who completed the check in ''Check By'' (see below)
Checked by:	**Important** **Name of the person who performed the hearing check.** **Enter a name manually or click the icon – This is the name of the person who performed the check and signed on the form, and not the data entry person. The checked by person can be different for different checks for the same child e.g. nurse, ear and vision technician etc.**
Date Completed:	Date the check was completed.
Outcome:	**Pass Bilaterally**: Child has passed the Audiometry tests, and Tympanometry tests, where done. No issues and nothing outstanding. **Referred**: Child is referred for further services. Does not mean a confirmed appointment. For further information on referrals, see Referrals on Page 73 and Referral Rules and Field Descriptions on Page 75 **Rescreen**: Check cannot be done. **Decline**: Check cannot be done. Child or caregiver declined to undertake test.

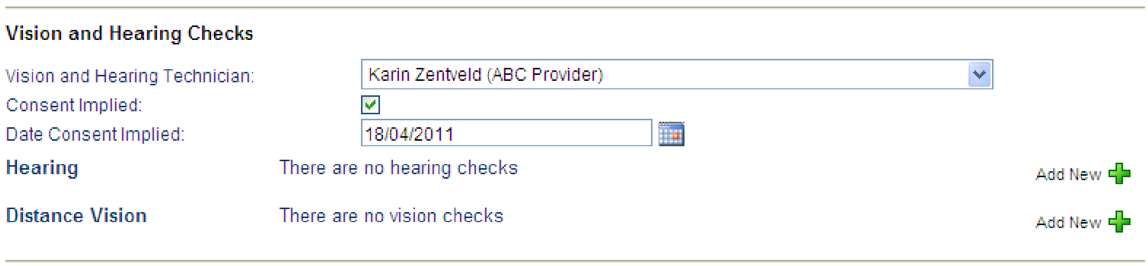
Additional Resources:

The B4SC: A Handbook for Practitioners;

Hearing Screening Pages 9-15.

16.3 Vision and Hearing – Vision Check

1. **Click** “B4School (YYYY)” button B4School (2011) to open the Overview screen. The Vision and Vision Checks section is below the Questionnaire section (page down to view).



2. **Click** the **Add New** link (Add New) to the right of the Distance Vision heading. The following screen will appear.

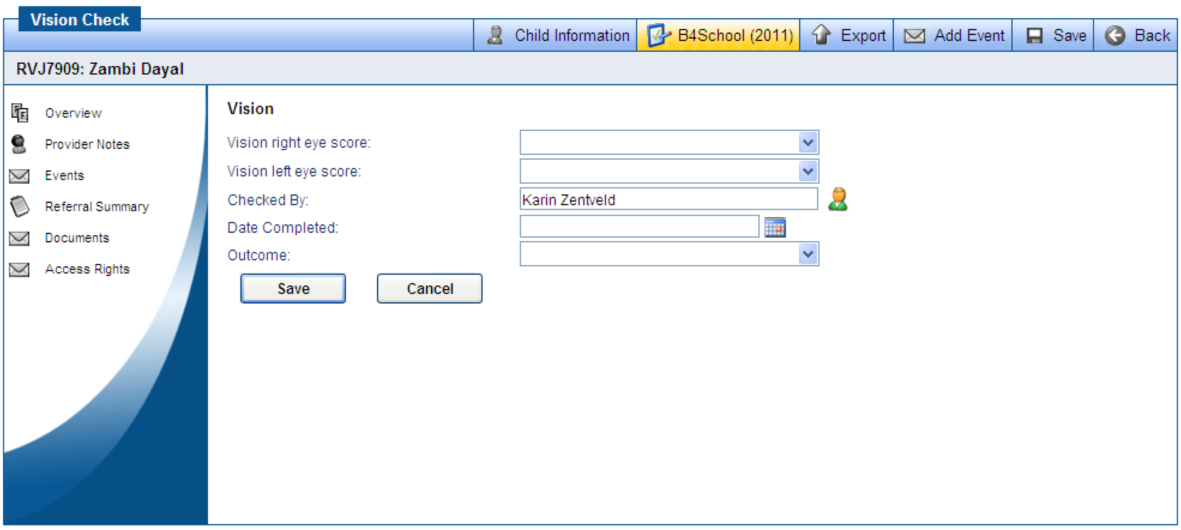


Figure 37 Vision - Updated Screen

3. **Record** both vision scores from the drop down lists.

   For more information see Field Descriptions for Vision Check on Page 63.

4. Click **Save** when finished

Field Descriptions for Vision Check

Field Name	Description
Entered by:	Name of the person who entered the details into the B4SC IS, if different from the person who completed the check in ''Check By'' (see below)
Checked by:	**Important** **Name of the person who performed the vision check.** **Enter a name manually or click the icon – This is the name of the person who performed the check and signed on the form, and not the data entry person. The checked by person can be different for different checks for the same child e.g. nurse, ear and vision technician etc.**
Date Completed:	Date the check was completed.
Outcome:	**Pass Bilaterally:** Child's passes the vision test. **Referred:** Child is referred for further services. Does not mean a confirmed appointment. For further information on referrals, see Referrals on Page 73 and Referral Rules and Field Descriptions on Page 75. **Rescreen:** Child's vision is 6/9 in one eye and 6/6 in the other. **Decline:** Check cannot be done. Child or caregiver refused to undertake test.

Additional Resources:

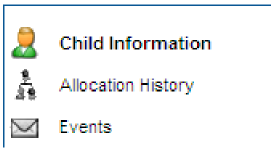
The B4SC: A Handbook for Practitioners:

Vision Screening, Pages 18-23.

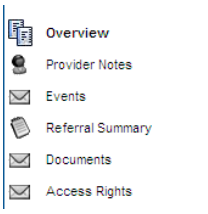
17 MANAGING CHECKS

The left navigation panel provides access to additional information relating to the selected child.

From the **Child Information** screen you will see the following **Left Panel:**



From the **B4School (2011)** screen you see the following **Left Panel:**

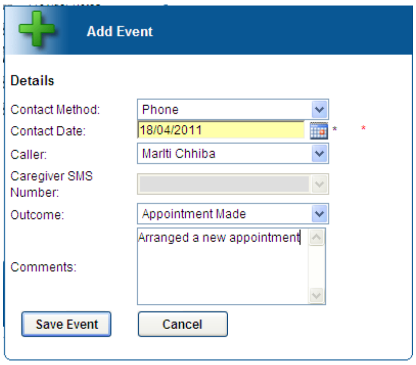


Panel Options	Description
Child Information **Child Information screen links**	
Allocation History	Displays the Childs allocation history if the child has been reallocated to different providers and/or DHB's.
Events	Events provide a record of contacts with the provider relating to the child's B4SC process. These may include phone calls, or other forms of communication.
B4School (2011) **B4School (YYYY)" screen links**	
Overview	Displays the Child's overview screen, where you can see the status of all Checks and enter information for checks.
Provider Notes	A Provider may want to create a note against a child record as a reminder to do something or log a concern to be followed up. The Notes section enables the Provider to send notes to the Coordinator about a child record. The notes are flagged in the Assigned, Completed or Closed lists in the Allocation tab for the Coordinator to view.
Events	Events provide a record of contacts with the provider relating to the child's B4SC process. These may include phone calls, or other forms of communication. See Events on Page 65 for further information.
Referral Summary	This provides a summary of any referrals resulting from this child's check results. It provides a list of the referrals, their Status, and who the child was referred to.
Documents	Documents relating to the child can be uploaded onto the B4SC IS.
Access Rights	Providers can give other providers read and/or write access to a child's B4SC details.

18 EVENTS

Events provide a record of contacts with the provider relating to the child's B4SC process. These may include phone calls, or other forms of communication.

18.1 Add event



1. When you are in a child's record you are able to add an Event by click on the **Add Event** button (Add Event) found at the top of the relative check screen. This will open the standard "Add Event" screen.

Or Click the **Add Event** link at the top of the relative check screen Add Immunisation Event (This link will only be available if you have saved a check)

2. **Add** the event details. Ensure all details of the event are correct, as the event cannot be edited or deleted once saved. Click **Save** when finished.

18.2 Events history

From the left navigation panel, select Events (circled below). This provides a summary of any contact events during this child's B4SC process.

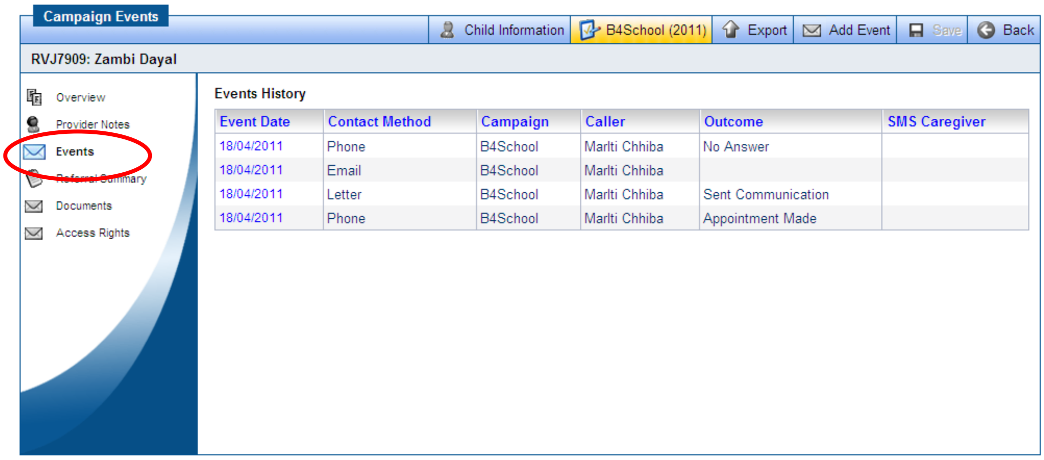


Figure 38 Events Summary Screen

Click a column heading to sort the results by that column. Click the column heading repeatedly to sort in either ascending or descending order.

Important

There is no indicator to show which column heading the records are sorted by. This can only be determined by looking at the records displayed.

18.3 Viewing an event

1. From the **Events Summary** screen, click the **Event Date link** of the Event to View. The Event Details screen will appear:

Figure 39 Events - Details Screen

2. To exit the screen, click the Events link in the left hand navigation panel.

18.4 Edit / Delete events

Important

Events cannot be edited or deleted once they are saved

19 PROVIDER NOTES

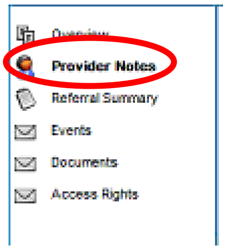
In some cases, a Provider may want to create a note against a child record as a reminder to do something or log a concern to be followed up.

The Notes section enables the Provider to add notes against a child's record. The notes are flagged in the Assigned, Completed or Closed lists in the Allocation tab.

19.1 Adding Provider notes

1. Click the "B4School (YYYY)" 

tab
2. Click "**Provider Notes**" on the Left Panel



3. A **Coordinator** can only enter notes into the Notes and/or Urgent Notes fields. Once this is done, click Save.

   A **Provider** can enter details into all fields. The Provider can also click the Acknowledged check box to acknowledge the note. Once updates to the notes are completed, click Save.
4. When the provider notes screen is viewed, an additional New Notes section will appear (circled below). This is used to add additional notes. Each time additional notes are added, these are automatically moved to the Notes section (after clicking Save).

Figure 40 Provider Notes Screen

19.2 Viewing notes from the allocation screen

From the Allocation Screen, click the Note icon in the Notes column.

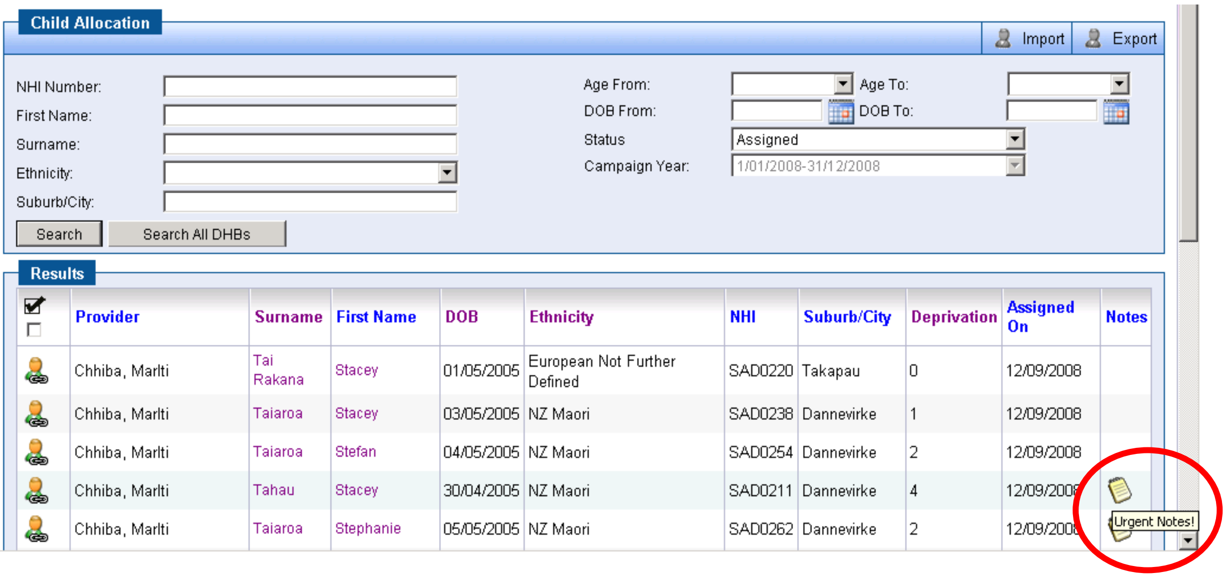
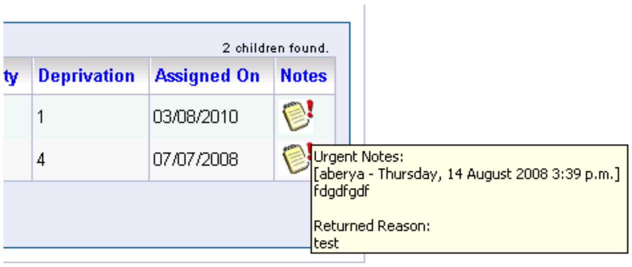


Figure 41 Urgent Notes – Viewing



Note

Urgent notes are displayed as a tool tip in the allocation search page.

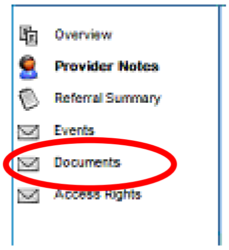
This is also used to display the return reason

20 DOCUMENTS (UPLOAD, DOWNLOAD, AND EDIT)

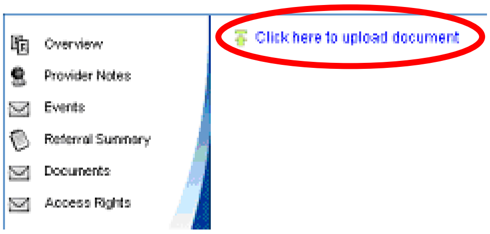
20.1 Upload document

Documents relating to the child can be uploaded onto the B4SC IS.

1. Click the "B4School (YYYY)" B4School (2011) tab
2. Click "**Provider Notes**" on the Left Panel. This will open the Documents screen



3. Click the "**Click here to upload document**" link



4. Browse to the document to upload, enter a comment if wanted, mark if the file is to be read only (do this if the document is not to be changed), and click the Upload link (Upload). The documents screen will reopen, showing all documents that have been uploaded.

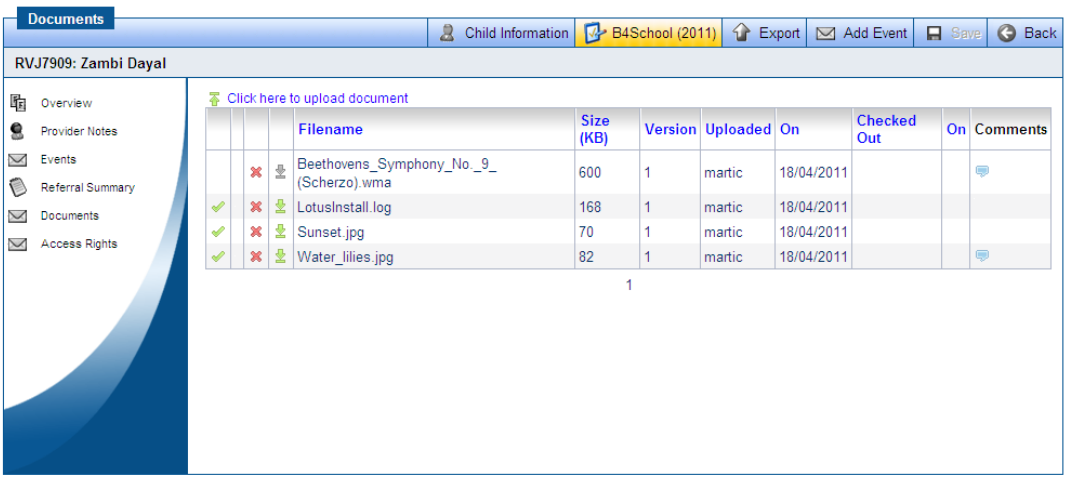


Figure 42 Upload Document Screen

20.2 Document Upload icons

- The 1st column provides a link to check out (edit) an uploaded document ( )

  When a document is checked out, the check out icon changes to a Check In icon ( ), an Undo Checkout icon ( ) appears, the Delete icon ( ) disappears, the user is recorded in the "Checked Out" column, and the check out date recorded in the "On" column.

  When a document is checked back in, the Version Number will increment by 1.

- The 2nd column contains an icon to undo checking out of a document ( ). This can be used if the user has checked out a document to make changes, then decided not to apply those changes. The Check out needs to be undone so that someone else can check out the document (if they wish to), and users viewing the child record can see that the documents are not being worked on.
- The 3rd column contains a Delete icon ( ) that allows you to delete uploaded documents
- The fourth column contains a Download icon ( ) that allows the user to download a document without checking it out (i.e. the use wants a copy of the document, and does not want to edit and upload it).
- The Filename column contains the name of the file that was uploaded. If an uploaded file contained spaces in the filename, these are replaced with underscores (_) during the upload process.
- The Size (KB) column states the size of the file that was uploaded (in kilobytes). The files in the diagram above are test documents, so are very small 1KB files.
- The Version column states the version number of the document uploaded. All documents are assigned version 1 when first uploaded. Each time a document is checked in, after being checked out and edited, the version number is incremented by 1.
- The Uploaded column states the B4SC IS user name of the person uploading a document.
- The On column shows the date the latest action was performed on the document (i.e. last upload date, or date of checking a document out).
- The Comments column contains a comment indicator ( ) that indicates if a comment was written at the time the document was uploaded. Hover the mouse over the indicator to view the comment.

20.3 View or download document

The user can either view a document, or download a copy of it.

1. Click the **Download icon** ( ) next to the document to retrieve a copy of. A dialog box will appear for the user to choose what to do with the file.
2. Click either **View**, to **Open** the file, or **Save** to save a copy of it. Choose Cancel to stop the download operation and return to the Documents screen.
3. To Save the document, click **Save** and state a location to save the document to. Click Save again.

20.4 Check out, edit, and check in/upload document

The user can edit a document that has been uploaded into the B4SC IS. Only one user can check out and edit a document at a time.

1. Click the **Check Out** icon ( ) next to the document to be edited. A dialog box will open, asking to Open or Save the document, or Cancel the operation.
2. Click **Save**. The Save As dialog box will appear.
3. Select a **directory** to save the file to, and click **Save**. A Download Complete dialog box will appear.
4. Click **Open** to open the downloaded document, Open Folder to view the folder that the file was downloaded to, or click Cancel to close the dialog box.
5. Edit the document and save it.
6. To check the document back in, click the **Check In icon** ( ). This will open the Document Upload/Check in window.
7. **Browse** to the file to upload, and enter a comment.
8. Click the **Upload link** (Upload). The Documents screen will reappear. The Version number will increment by one, the Uploaded column will reflect the name of the user uploading the document, and the date in the Uploaded On column will change to the upload date. The icons in the first three columns will change from Check In and Undo Check In ( ) to Check Out and Delete ( ). Hovering over the Comments icon will show the comment written when the latest document was uploaded.

20.5 Allowing other providers access to a child's B4SC details

An allocated provider can give other providers read and/or write access to a child's B4SC details. This is useful if part of the check is to be delivered by another provider (e.g. in the case of Vision and Hearing Technicians).

1. Click the "B4School (YYYY)" 

tab
2. Click "**Access Rights**" on the Left Panel. This will open the Access Rights screen

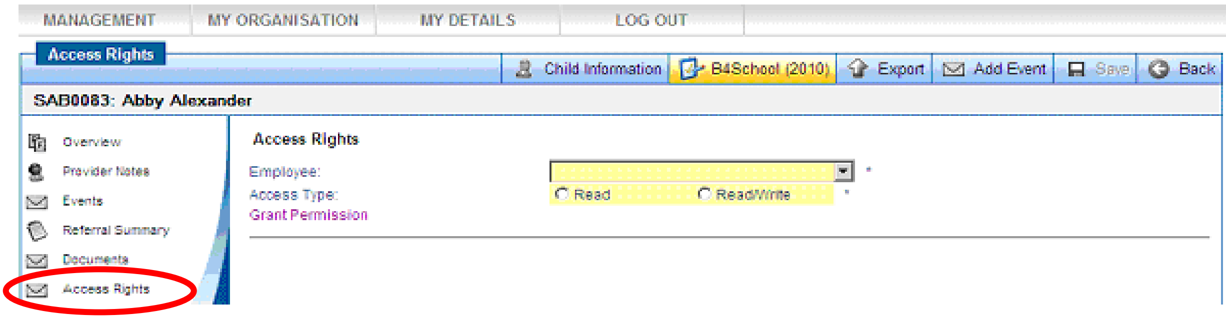


Figure 43 Access Rights Screen

3. Select a **Provider** from the Employee drop list
4. Select whether the provider can amend the child check record by selecting **Read/Write** access, or can only read the child by selecting **Read** access.
5. Click the **Grant Permission** link (Grant Permission). An Access Rights section of the screen will be displayed (below), showing the permissions that have been granted.

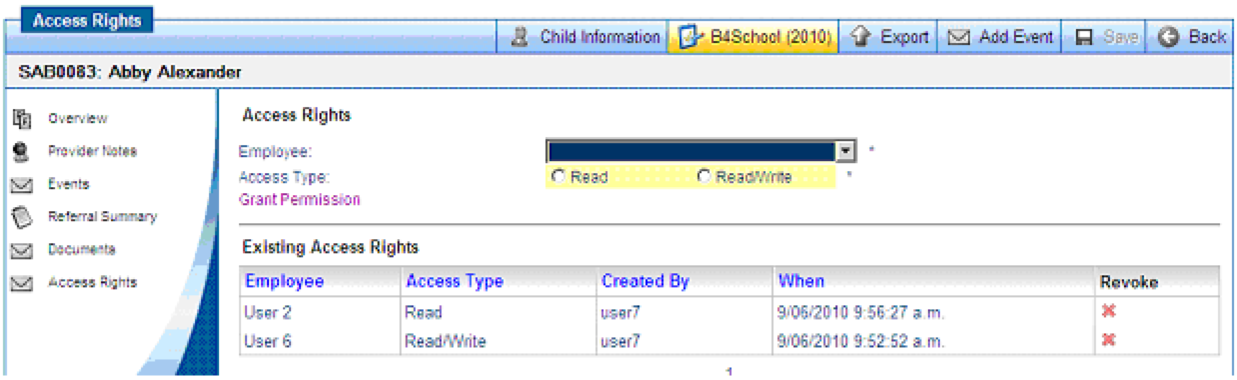


Figure 44 Access Rights – Changing Permissions Screen

Remove access for other providers to a child's B4SC details

The provider can remove previously granted access to a child's B4SC IS records.

1. Click the **Revoke icon** () next to the provider name to remove access. The Access Rights screen will be redisplayed with the user access permission removed.

21 REFERRALS

A Referral can be added from any of the Check screens.

Note

B4SC consent form is only for checks and not for any referrals made. A parent must give consent before making a referral. Refer to details in the "Informed Consent" section of the handbook for practitioners.

The Coordinator must confirm with the respective clinic once the child is referred, to ensure the referral service has assessed and accepted the referral, and started providing services. This must be recorded in the 'intervention started date' field for that referral before the overall check can be closed.

21.1 Adding a Referral

1. **Click** the "B4School (YYYY)" 

tab

2. A referral can be added by choosing a 'referral' as the outcome of the individual checks. Or

   Adding a referral later by **Clicking** the **date** that appears against the check you want to add a Referral for:

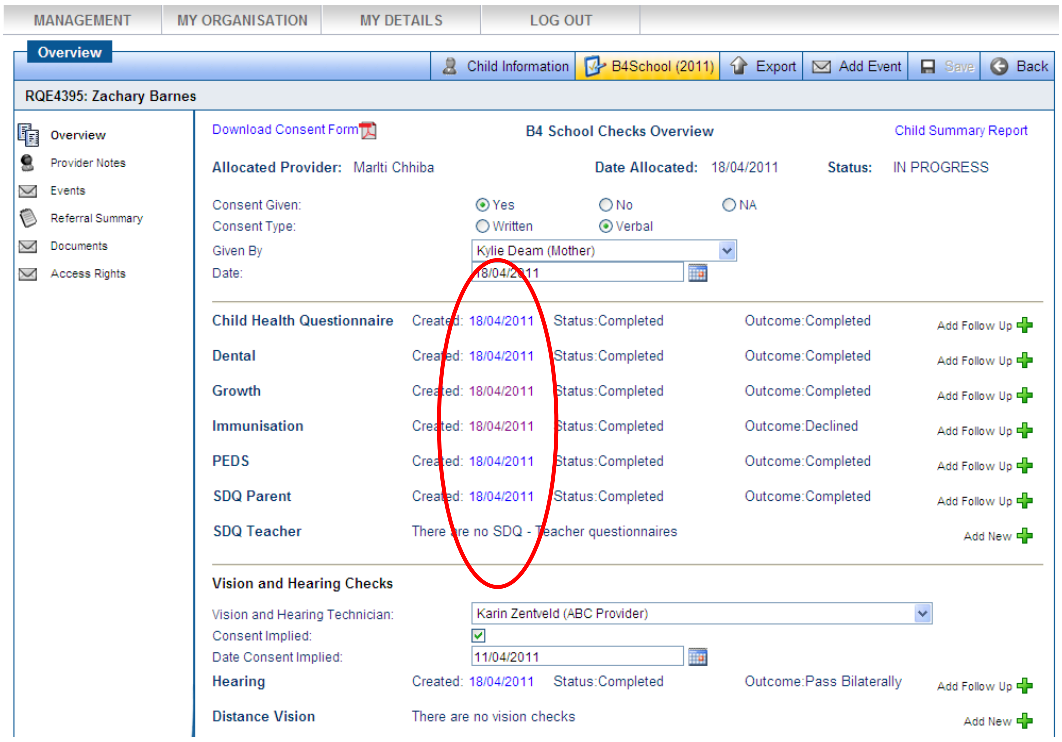


Figure 45 Referral – Adding from Overview Screen

This will open the respective check screen

3. Click the "**Add referral** link (Add Referral), located in the bottom right corner of the check screen.

The referral screen, similar to the one below, will appear:

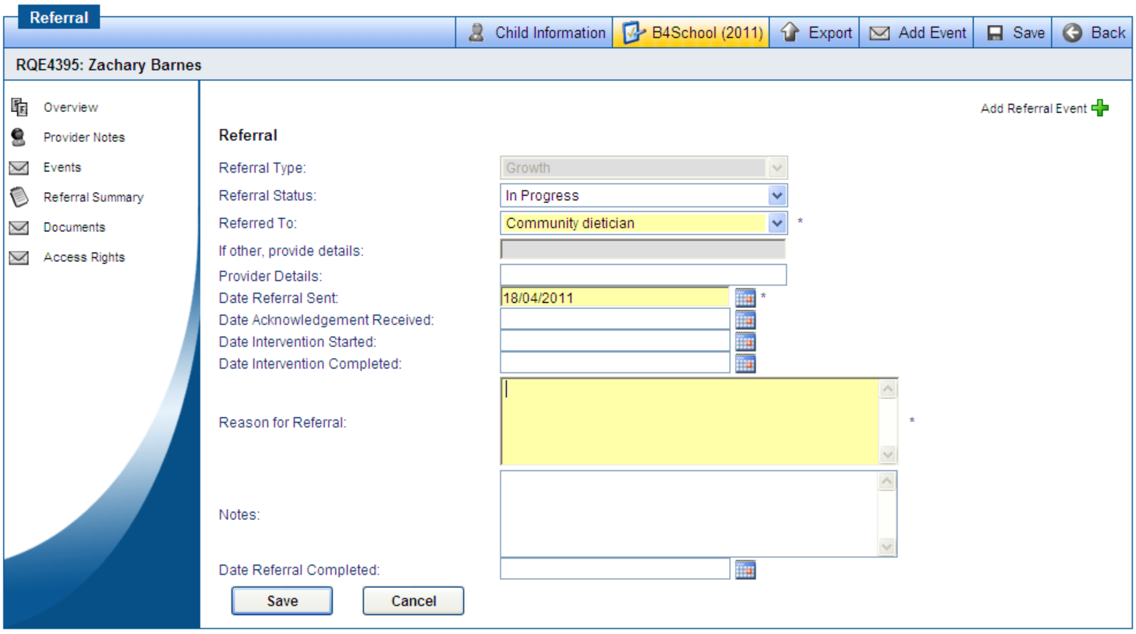


Figure 46 Referral Screen – Updated Screen

Note

There are mandatory fields to complete the overall check, and some further ones to close it.. For further information on referrals, see **Referrals on Page 73 and Referral Rules and Field Descriptions on Page 75.**

4. Fill-in the required information. All yellow boxes are mandatory.

5. For further information on these fields see Referral Rules and Field Descriptions on Page 75.

6. Click **Save** button. The Overview Screen should be redisplayed.

(or click the "B4School (YYYY)" B4School (2011) tab

or click the Overview link (Overview)in the left panel)

The word "**Referred**" is added against the check in the Overview Screen.

The Referred link can be clicked to view the referral.

21.2 Referral Rules and Field Descriptions

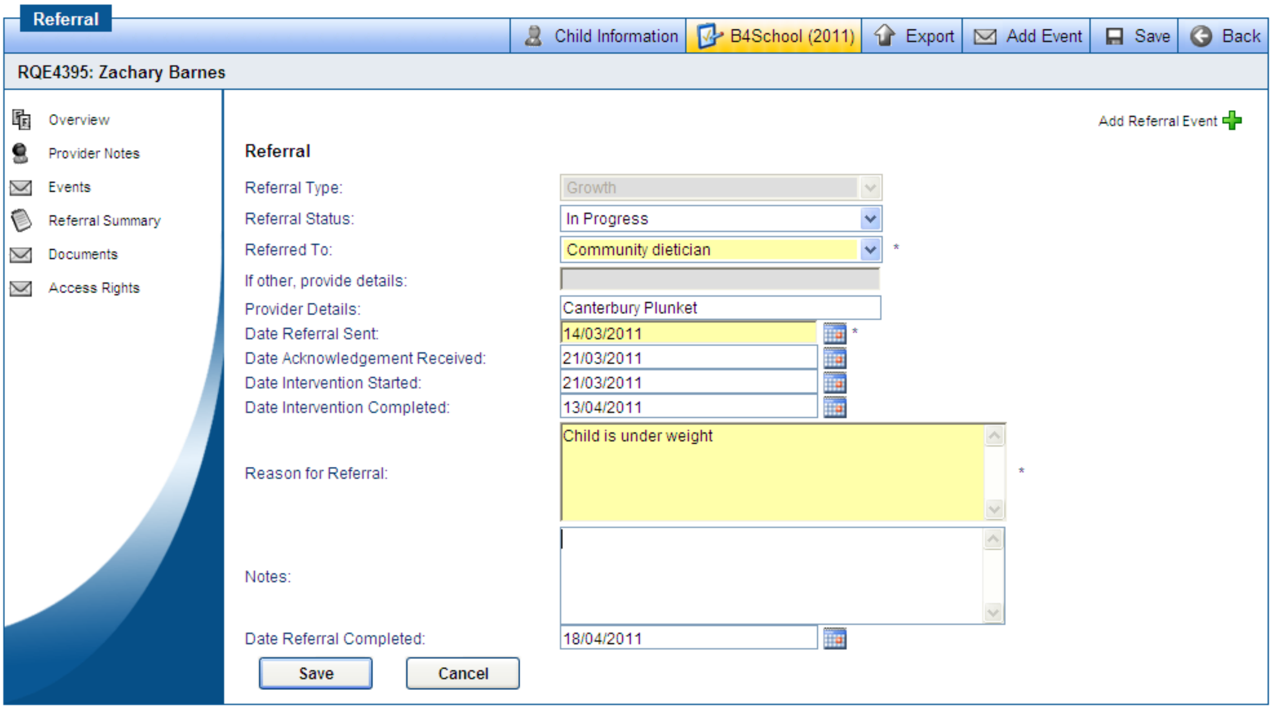


Figure 47 Referral Screen Fields

Referral Rules and Fields continued next page…

Field	Mandatory to:		Comments
	Complete Check	Close Check	
Referral Type:	☑		Is a self populated field, detailing where the referral has come from (e.g. hearing).
Referral Status:		☑	This field with have the following four status types: • In Progress (the check can not be closed while the referral is in progress) • Completed • Service provider declines • Caregiver declines
Referred to:	☑		This is a drop down box, as outlined on page 77. Users are encouraged to select the type that most closely relates to the referred service. If none fit, then 'other' should be selected.
If other, provide details:			This field is activated if users select 'other' under 'Referred to:'. Users will need to enter the type of service the child has been referred to.
Provider details:			This is an optional field, users can use to specify the service provider, e.g. ABC medical practitioner etc.
Date Referral Sent:	☑		This field dates when the referral was sent.
Date Acknowledgement Received		☑	This field should be used to confirm the date an acknowledgement is received from a referral
Date Intervention Started:		☑	This must be completed to specify when the intervention started.
Date Intervention Completed:			Users can complete this when the intervention has completed. This is an optional field.
Reason for Referral:	☑		This is a free text field to specify the reason for the referral.

Field	Mandatory to:		Comments
	Complete Check	Close Check	
Notes:			This is a non-mandatory field, users can choose to complete.
Date Referral Completed:		☑	This is the date when the referral page can be closed. The following fields must be completed before the referral can be closed: **1.** All mandatory fields are completed; OR **2.** The service / caregiver decline the referral and this has been entered into 'Referral Status'.

21.3 Table of referral types

Under '**Referred to**:' you will see the following items in the drop down list:

Audiologist	Neuro-dev. therapist
Child development services	Optometrist
Community dental – referral	Outreach immunisation
Community dietician	Paediatrician
Ear nurse	Parenting programme
Eye clinic	Private opthamologist
General practitioner	Promoting participation
Ministry of Education – Special Education	Public health
Incredible years	Public health nurse
Mental health services	Specialist services
Mobile immunisation	Other

21.4 To add additional referrals

1. Open the check you want to create an additional referral for
2. Click the **Add Referral** link (Add Referral) found at the bottom of the screen
3. Complete the referral screen

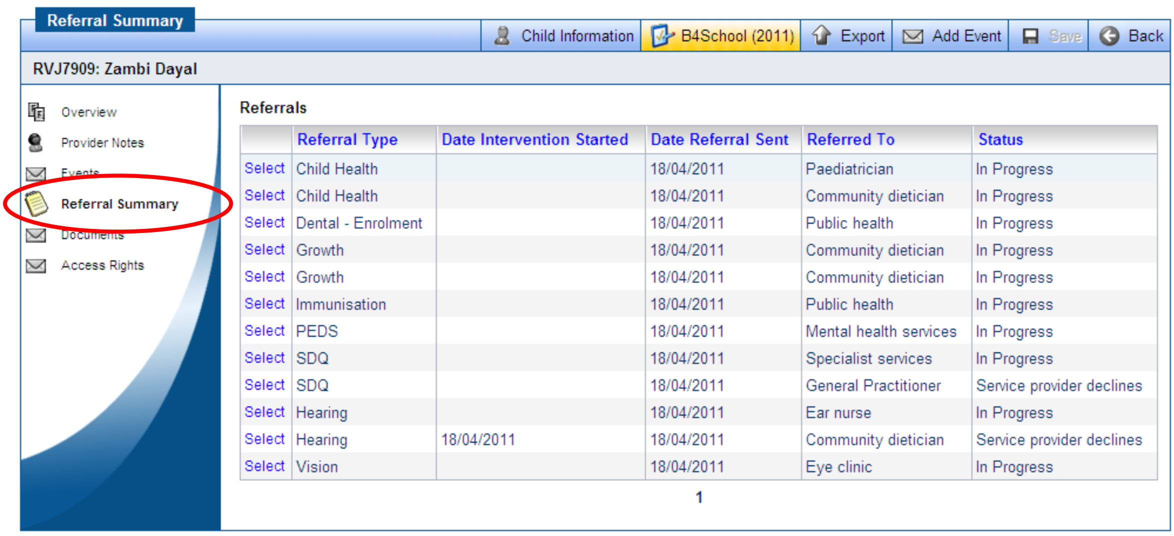
   For further information see [Referral Rules and Field Descriptions on Page 75.]
4. Click the **Save** button

21.5 Viewing the referral summary

This provides a summary of any referrals resulting from this child's check results. It provides a list of the referrals, their Status, and who the child was referred to.

The Child will remain on the Allocation list until all referrals are closed or completed.

1. Click the “B4School (YYYY)” B4School (2011) tab
2. Click “**Referral Summary**” on the Left Panel



	Referral Type	Date Intervention Started	Date Referral Sent	Referred To	Status
Select	Child Health		18/04/2011	Paediatrician	In Progress
Select	Child Health		18/04/2011	Community dietician	In Progress
Select	Dental - Enrolment		18/04/2011	Public health	In Progress
Select	Growth		18/04/2011	Community dietician	In Progress
Select	Growth		18/04/2011	Community dietician	In Progress
Select	Immunisation		18/04/2011	Public health	In Progress
Select	PEDS		18/04/2011	Mental health services	In Progress
Select	SDQ		18/04/2011	Specialist services	In Progress
Select	SDQ		18/04/2011	General Practitioner	Service provider declines
Select	Hearing		18/04/2011	Ear nurse	In Progress
Select	Hearing	18/04/2011	18/04/2011	Community dietician	Service provider declines
Select	Vision		18/04/2011	Eye clinic	In Progress

1

Figure 48 Referral Summary

3. Click the "**Select**" link against the Referral to view or edit (Status of these will be "In Progress")

This will open the Referral screen, as shown below:

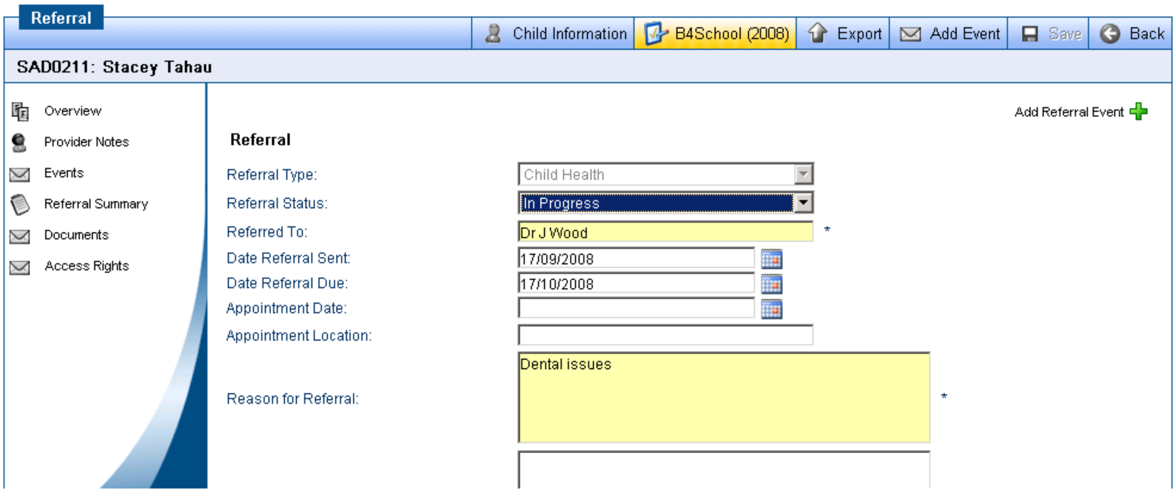


Figure 49 Referral Screen

4. Make amendments as necessary, and click **Save**.

5. Click Overview, in the left panel, to return to the Overview screen.

21.6 Closing off a referral

This process should be used once confirmation that the referral service has been started.

1. Change the "**Referral Status**" from "In Progress" to **Completed**
2. Enter the mandatory fields required to complete and close this Referral

   For detailed information see Referral Rules and Field Descriptions on Page 75.
3. If changes are made, click **Save**

Notes

The status of the referral, on the Overview page, will show as Completed.

If there are no other outstanding referrals, the profile can now be closed. Refer to the "Close a child's check record" section for further details.

CLOSE A CHILD'S CHECK RECORD

There are two stages to closing a child's record.

A child's overall check can only be <u>Completed</u> when:

- **All checks**, including any follow up checks have been **completed**
- **Referrals** can still be in progress. For further information on referrals, see Referrals on Page 73 and Referral Rules and Field Descriptions on Page 75.

A child's overall check can only be <u>Closed</u> when:

- **All checks**, including any follow up checks have been completed and
- **All referrals** have been completed

Close record

1. Search for, and select, the child whose check record is to be closed.

2. Click the "B4School (YYYY)" 

tab. The Overview screen will appear.

3. Scroll to the bottom of the Overview screen.

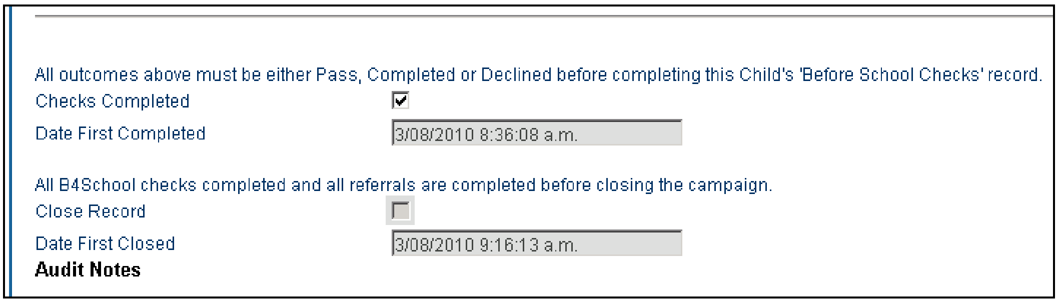


Figure 50 Closing a Childs Record

4. Click the **2 check boxes** (see above screen). These check boxes will only be accessible once all the referrals are completed and all checks are either completed or declined.

5. Add any additional notes relating to the closure (or any other aspect of the checks) in the **Audit Notes** field.

6. Tick the **Checks Completed** box

7. Click the **Save** Button

8. Tick the **Close Record** box

9. Click the **Save** button.

10. The Overview screen will be redisplayed, and the status of the checks will show as Closed.

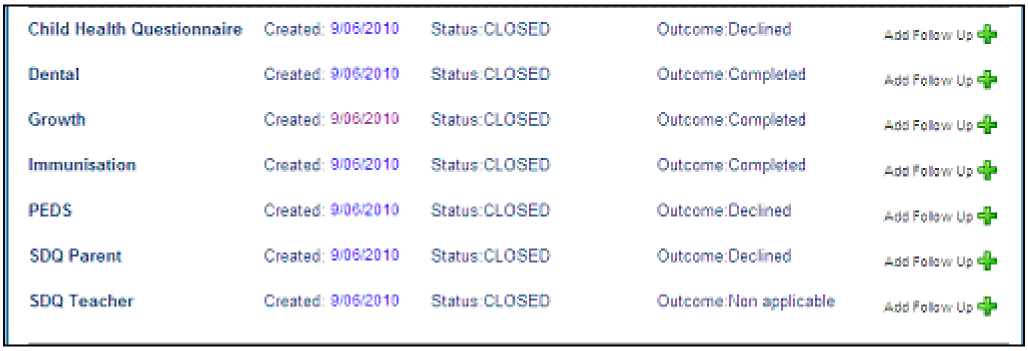


Figure 51 Check Displaying Closed

11. The System will remove the child from the Provider's allocated child list.

Re-opening a check

1. Search for, and select, the child whose check record is to be closed.
2. Click the "B4School (YYYY)" B4School (2011) tab. The Overview screen will appear.
3. Scroll to the bottom of the Overview screen.
4. To reopen a Check, **Untick** the **Closed** box,

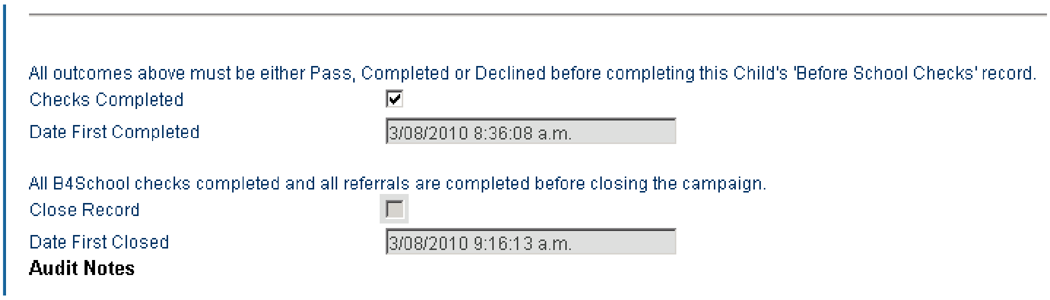


Figure 52 Reopening a Childs Record

5. Click the **Save button**
6. **Untick** the **Completed** box and click the **Save button** again.
7. You will be prompted to add **Audit Notes** at each stage.

Important

A date First Completed and Date first Closed now appears in the B4SC Overview page, these are read only fields. These values were added to the XML export, CSV export and child summary reports.

Add a check once a child's record is closed

If a child's record has been closed, and a follow up check is to be performed, additional checks can be added.

1. **Search** for, and select, the child whose check record is to be closed.
2. **Click** the "B4School (YYYY)" B4School (2011) tab. The Overview screen will appear.
3. Reopen the Check (For instructions see Re-opening a check on Page 82.)
4. Click the **Add Follow Up link** (Add Follow Up **)** on the right of the "B4 School Check Overview" screen (circled below).

   The overall status for the checks will change to **"In Progress"**

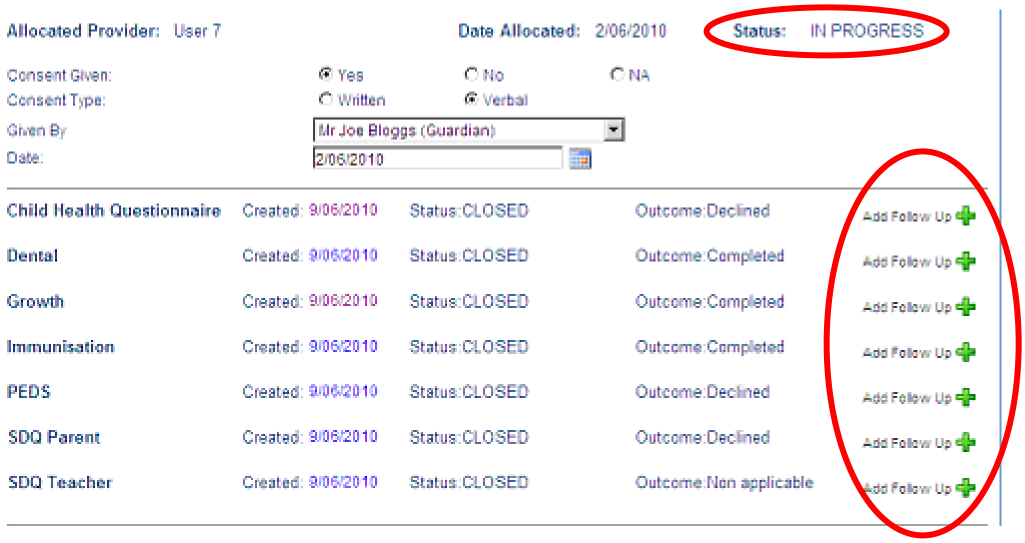


Figure 53 Adding a Check after Closure

5. Complete and Save the check. On the Overview screen, the check will be listed in the "B4School Follow-up Checks" section of the child's Overview screen.

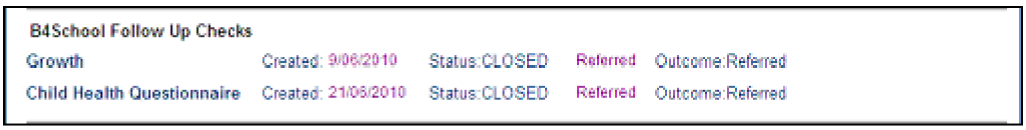


Figure 54 Follow-Up Checks section

6. Close the child's check record once all checks and referrals have been completed. For instructions refer to Close record on Page 81.

REPORTING AND DATA EXPORTING

Child Summary Report

1. **Search** for the child to review. If the child is not visible, select "Search All DHBs"
2. Click the **child's name**. The Child Information screen should be displayed.
3. Click the "B4School (YYYY)" B4School (2011) tab. The overview screen will be displayed.
4. Click the **Child Summary** link (Child Summary Report) in the top right corner of the screen. This will open the B4 School Check Results report screen:

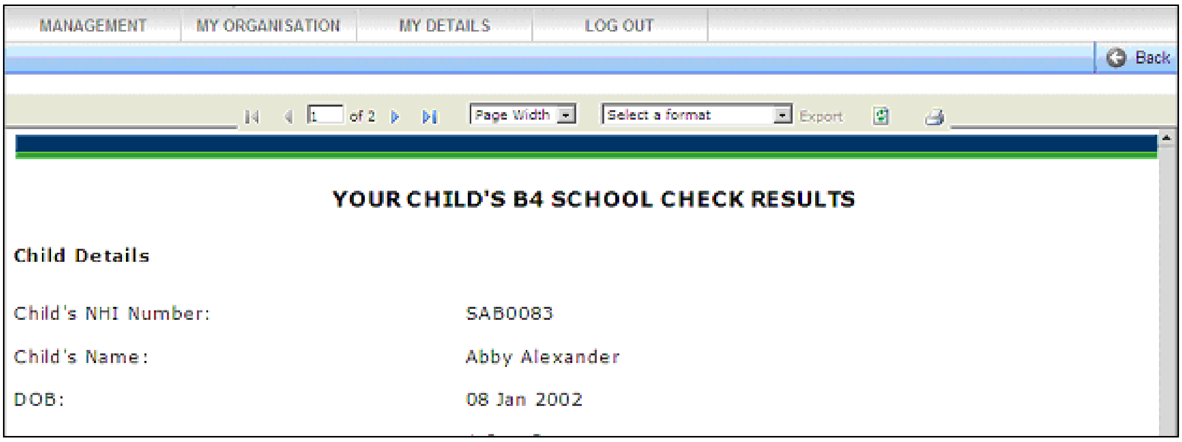
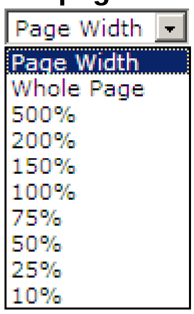
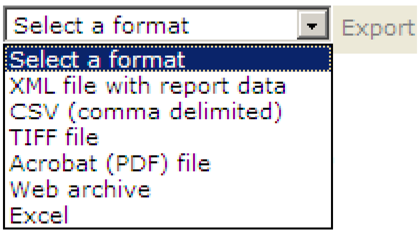


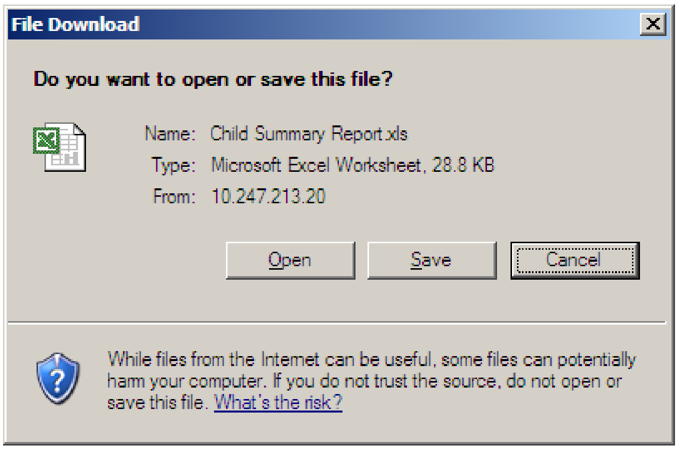
Figure 55 Chid Summary Report

5. To **scroll down** the page, use the browser scroll bar. The **Page Up** and **Page Down** keyboard buttons do not work on this screen.
6. To **view the next page**, use the 1 of 2 buttons, or **type the page number** and press **Enter**.
7. To **zoom** out on the page, to view more details, select an option from the zoom list
8. To **export** the report, select the format from the list box and then click the export link Export

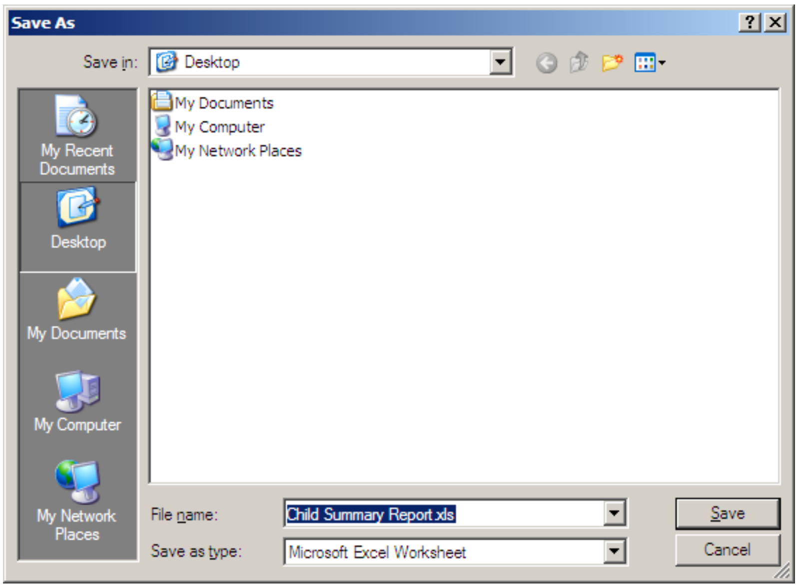




9. **Select** Open or Save on the dialog box that appears (In the example below, Excel was chosen from the format list.



(a) If choosing **Save**, the dialog box below will be displayed



(b) Select a **location** to save the file and click **Save**

10. To refresh the report, click the **Refresh button** ()

11. To print the report, click the **Print button** ()

Tip

The child's check does not have to be completed before printing the Summary

A summary cannot be printed for a child where the status is declined.

Standard data extracts for downloading

Important - Only coordinators can use this functionality.

The B4SC IS maintains unit level (per child) records that include demographic and clinical information to support the programme and the provision of services to eligible children.

Each night, the B4SC database generates a series of exports, representing unassigned/returned, assigned, completed and closed records by DHB. These files are available for download through the user interface. Coordinators are able to download export files through the B4SC IS.

Most fields of information, from the B4SC IS, are included in the files available for download.

1. Login as a Coordinator
2. Click the **Reports** tab on the menu bar.

3. Click **Exports** to view the list of export files available for download.

4. Click the **export file** to download.

Tip

The number of files visible may vary, depending on the types of checks within a coordinator's DHB.

In the above example, the first file is a Comma Separated Variable file (CSV) which can be opened using MS Excel and other spreadsheet applications. This CSV includes data taken directly from the database and adds additional calculated fields that support the B4 School Check programme.

Download and open the CSV file into Excel, and follow the instructions in the section "Simple analysis using the CSV file" below.

The last four files are raw data using an XML format suitable for integration into compatible systems.

22 USER ADMINISTRATION

22.1 Setting up access to the B4SC Information System

Prerequisites

1. The B4SC IS is a web-based application, and requires access to the internet and browser software (e.g. Internet Explorer, Firefox, Opera, Safari, etc).
2. Access to the Information System requires a Health Network connection. Refer to the MOH website www.moh.govt.nz/healthnetwork for information and an application form.
3. A username and password for the B4SC IS (set up by a Coordinator – refer to "Create a New User" subsection later in this "User and System Administration" section).

Production and training environments

The web addresses for the two environments are:

Production site: http://10.247.236.25/WebPages/Login.aspx

Training site: http://10.247.236.20/WebPages/Login.aspx

Create shortcuts to the B4SC IS

To set up the B4SC system for ease of access:

1. To **Add to Favourites –** from the Explorer menu click Favourites then Add to Favourites
2. To **Copy to Desktop** - Ctrl+drag (with mouse) from Favourites to the Desktop.

Notes

The system session will "time out" after 15 minutes of non use.

Use the training environment to become familiar with the system, and to test knowledge of the processes. The environment is safe to perform any activities in, and there is no issue if the test environment is broken as a result of user activities.

Usernames and passwords are the same in both environments. Usernames and passwords are not to be recorded in any form where they may be discovered.

Rename shortcuts to include "Production" or "Training", for ease of site identification.

22.2 User types and roles

The B4SC system user types and their roles are outlined below.

National Coordinator

Has a national overview of the B4SC process, and liaises with various B4SC Coordinators to facilitate the B4SC process. National Coordinators utilise the system to:

- Search for children within the target group nationwide
- View a list of children in the target group (i.e. turned four years old and require a check)
- View a child's information
- View the status of B4SCs

National Coordinators have **Central Administrator** access to the system to maintain details of system users nationwide. Central Administrator access allows the National Coordinator to:

- Add and maintain DHB and regional organisations (if the DHB has outsourced the coordinator function)
- Add and maintain provider organisations
- Add and maintain employees in all organisations
- Allocate roles and access rights for all employees
- View the list of all employees and their relationships with other organisations
- Set/reset passwords

B4SC Coordinator

Operate at a DHB level and facilitate the B4SC process by dealing directly with the provider organisations within the DHB regions. Coordinators utilise the system to:

- Search for children who have turned four years old nationwide
- View children who have turned four years old in their region
- Allocate children to provider organisations in their region (assuming a centralised DHB service model)
- View the status of B4SCs in their region
- View a child's information in their region
- Enter consent details, B4SC results, and referral confirmations into the system

B4SC Coordinators usually have **Local Administrator** access to the system to maintain details of system users at their DHB (and provider organisations if required). Local Administrator access allows a B4SC Coordinator to:

- Maintain provider organisations for the DHB
- Add and maintain employees at their DHB and also the provider organisations if required
- Allocate roles and access rights for these employees
- Set / reset passwords
- View a list of employees in their DHB region, along with employee relationships with other organisations

The above role can be put under the Coordinator. Some of these functions are also applicable to the Lead Provider (adding employees etc to the organisation)

Lead Provider

May be responsible for coordinating the B4SCs for their organisation. The Lead Provider also directly performs B4SCs. They use the system to:

- View children who have been allocated to them, and who have turned four
- Search for children who have turned four years old nationwide (and self allocate them in the case of a distributed service model)
- Return children to the B4SC Coordinator that are not part of their organisation / cohort
- Allocate children to providers within their organisation (either allocate to self, or allocated by the Coordinator if the DHB chooses the centralised business model)
- View the status of B4SCs allocated to their organisation
- Complete the B4SC requirements for children in their organisation
- View a child's information in their organisation
- Enter consent details, B4SC results, and referral confirmations into the system

Local Administrator

The Lead Provider and Co-ordinators may also have **Local Administrator** access to maintain details and passwords of employees of that provider organisation DHB. Local Administrator access allows the Lead Provider to:

- Add and maintain employees to their organisation
- Allocate roles and access rights for these employees
- Set passwords
- View the list of employees in their organisation and their relationships with other organisations.

Provider

Providers directly perform the B4SCs in their provider organisation. The provider can:

- View children who have turned four years old that are assigned to them
- Search for children who have turned four years old nationwide
- Return children to the B4SC Coordinator that are not part of their organisation / cohort
- View the status of B4SCs allocated to them
- View a child’s information allocated to them
- Complete the B4SC requirements for children allocated to them
- Enter consent details, B4SC results, and referral confirmations, into the system

Vision and Hearing Technician (VHT)

The role is similar to the Provider role, except access to checks is limited to the vision and hearing sections. The VHT can:

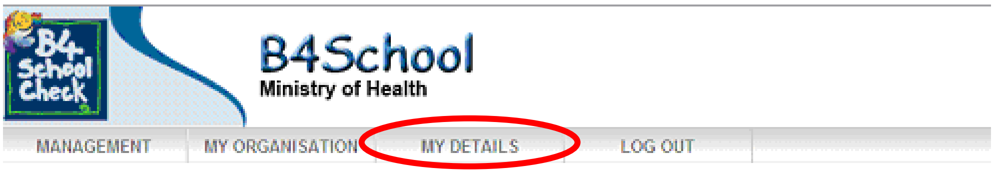
- View children who have turned four years old that are assigned to them
- Search for children who have turned four years old nationwide
- Return children to the B4SC Coordinator that are not part of their organisation / cohort
- View the status of B4SCs allocated to them
- View a child’s information allocated to them
- Complete the Vision and Hearing checks for children allocated to them
- Enter Vision and Hearing referral confirmations into the system

For further information see Users of the System and their Roles on Page 4.

22.3 View / Edit My (user) Details

This process allows a user to View or Edit their name and contact details.

1. Log into the B4SC IS
2. Click the **My Details** tab



The following screen will be displayed:

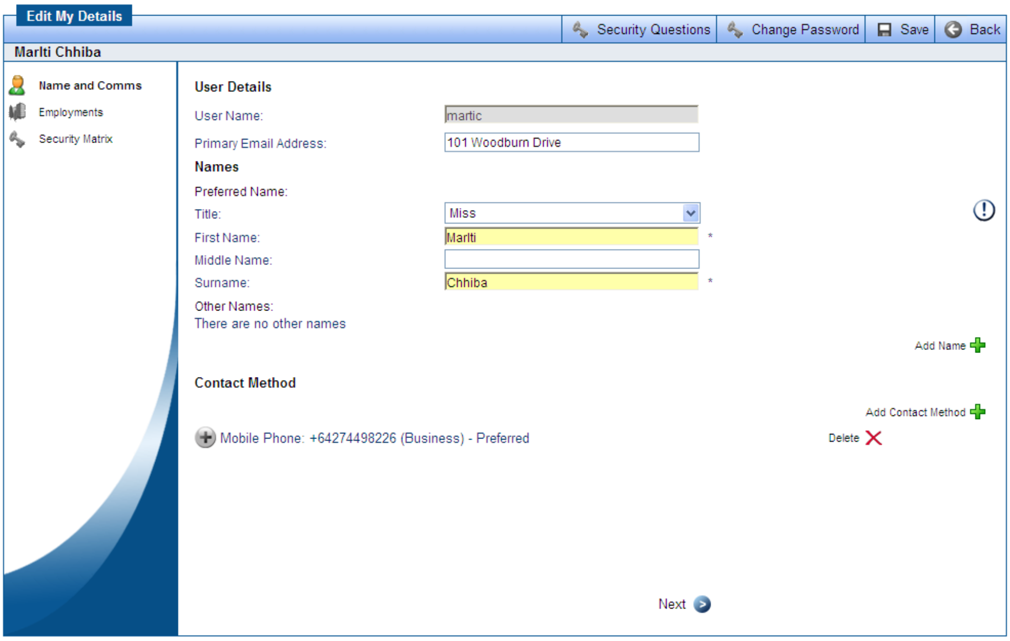


Figure 56 User Details Screen

Important

Yellow fields, also marked with an asterisk (*) are compulsory.

3. Add additional information, using the following:

   To add **Other Names** click the Add Name link (Add Name).

   To **remove Other Names** (if already added) click the Delete link (Delete).

   To add **Contact Method** click the Add Contact Method link (Add Contact Method).

4. Click the **Save** button (Save) in the menu bar at the top of the screen, if any changes have been made.

5. Click the **Next** button (Next) at the bottom of the screen. The following screen will appear, showing the organisations the user is associated with.

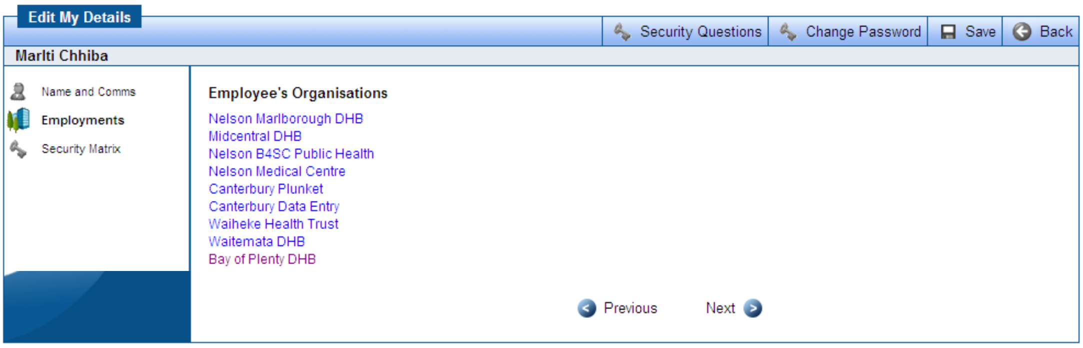


Figure 57 Employments – Employee's Organisation Screen

6. To **View/Edit** the Users relationship with an organisation, click the **organisation** listed. A screen similar to the one below will appear.

Figure 58 Employment Screen

Important

You are only able to change your access if you have local administration rights.

If changes are made, click the Save button (from the menu bar), or the Back button.

The **Edit My Details** screen will be redisplayed.

7. Click the **Next** button (Next) at the bottom of the screen. A screen showing the security matrix associated with the user will appear.

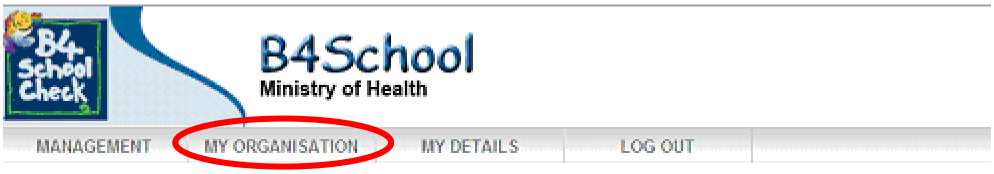
8. The security matrix is a system administration screen. The user does not need to access this screen.

Click the Back button to return to the **My Details** screen.

22.4 View / Edit “My Organisation” details

The Coordinator or the local administrator have the appropriate access to setup individual employees to the Before School Check Information System.

1. Log into the B4SC IS
2. Click the **My Organisation** tab



The following **Maintain My Organisation** screen will be displayed:

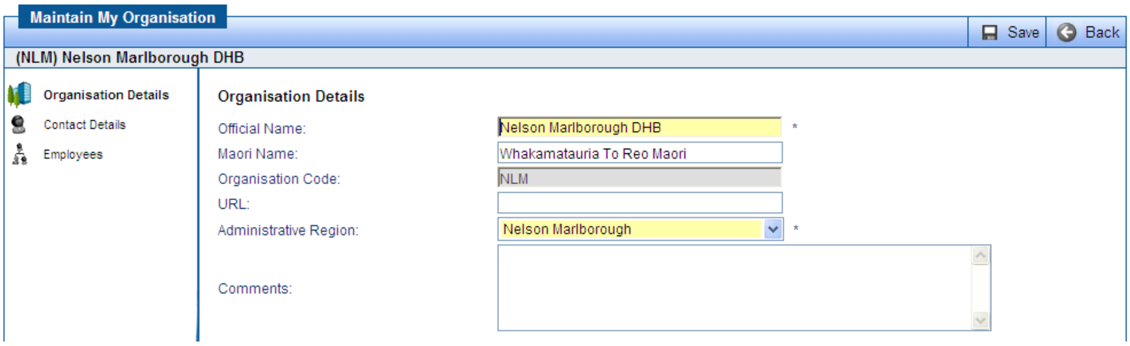


Figure 59 Organisation Details Screen

3. Add additional information by entering details into the appropriate fields.
4. Click the **Save** button (Save) in the menu bar at the top of the screen, if any changes have been made.
5. When finished, click the **Next** button (Next) at the bottom of the screen. The following **Contact Details** screen will appear (these are details to contact the user within the organisation, not the switchboard contact details of the organisation):

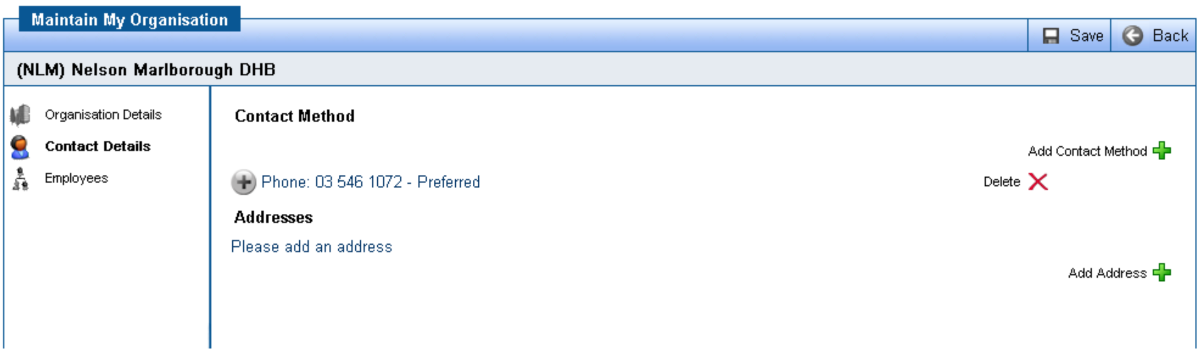


Figure 60 Contact Details Screen

To add **Contact Method** click the Add Contact Method link

To add **Address** click the Add Address link

To **view** existing **Contact or Address Details** click

To **hide** existing **Contact or Address Details** click

To remove **Other Names** (if already added) click Delete

6. Click the **Save** button (Save) in the menu bar at the top of the screen, if any changes have been made.

7. When finished, click the **Next** button (Next) at the bottom of the screen. The following screen will appear, showing **employees** associated with the organisation: Click **Finish** button.

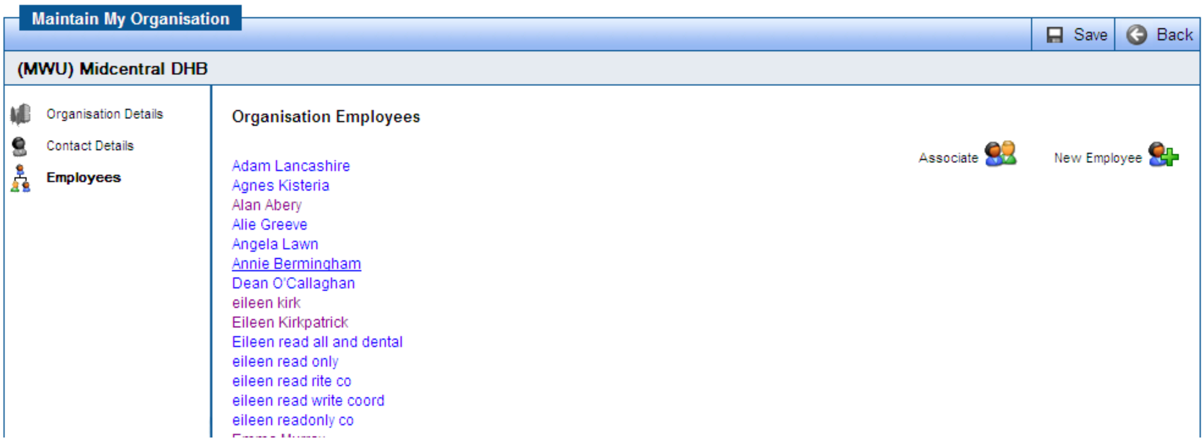


Figure 61 Employees Screen

Important

Organisation code:

The organisation codes for Regional Coordination Centres are used to match a child's geo coded address with the regional coordination centre (DHB). Also the nightly CSV export writes to a folder based on the organisations code. If the organisations code is changed then no children will be assigned to that DHB when the address is changed and the CSV export process stops.

The organisation code for regional coordination centres is now read only.

23 SYSTEM ADMINISTRATION

Important – The appropriate access is required for creating new users

Each user of the B4SC IS is recognised by a username and password combination. These are unique to each user, and provided on condition that usernames and passwords are not shared.

Only a user with administrator rights (Local Administrator or Central Administrator) can add a new user to the organisation to which the administrator user is employed. To add a user to a different organisation, request that organisation's administrator to add the new user.

Obtain a signed Authorised User Acceptance form (AUA) from the New User (download from the QuickPlace site http://www2.moh.govt.nz/b4schools). This is to be retained by the administrator as evidence that the new user has read and understood their obligations. The form also provides information required to load the new user into the B4SC IS. There is no need to submit the AUA to the Ministry of Health, but it should be retained and presented if requested.

The following is the minimum information required to add a user:

- First Name
- Surname
- Telephone number
- Role
- Access Level

23.1 Create a new user

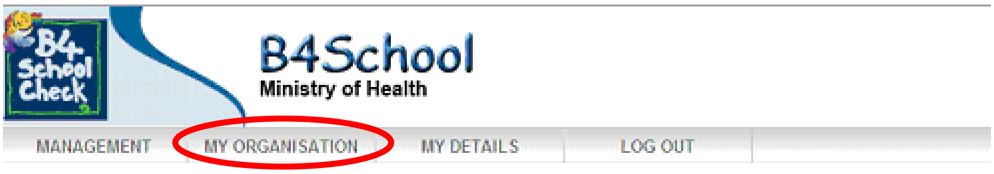
This process is used when adding users, who are not currently in the system.

Important

Before adding a new user check to see whether the user already has access for a different provider organisation. See Assigning Existing user to multiple organisations on Page 102 – follow steps 5 to 7.

If the user does not have access follow the following steps:

1. Log into the B4SC IS, and log into the organisation the new user is to be added to. Administrator rights are required to add a new user.
2. Click the **My Organisation** tab



The following Maintain My Organisation (Organisation Details) screen will be displayed:

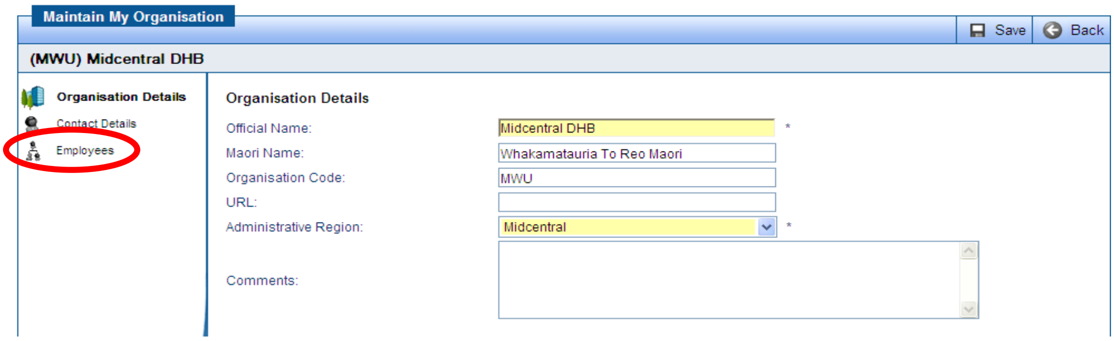
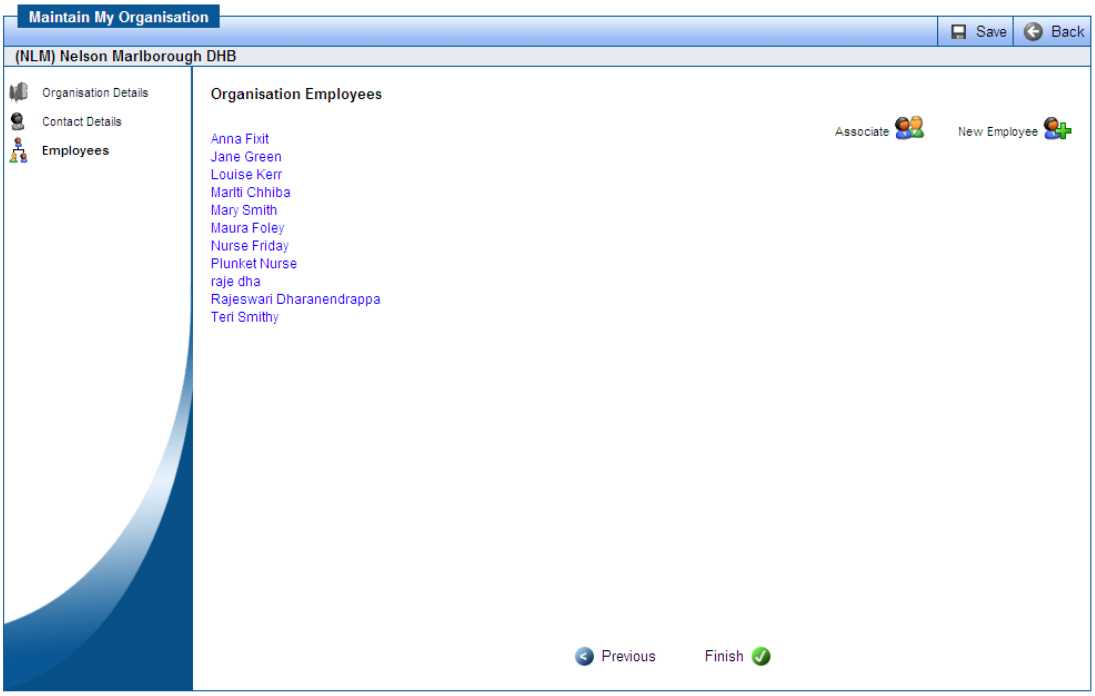


Figure 62 Organisation Details Screen

3. In the left hand panel, click the **Employees link** (Employees) for a list of current employees.



4. If the user is not currently set up on the system for this organisation, click **New Employee** link (New Employee) at the right of the screen, a blank **Edit Employee Details** screen will be displayed:

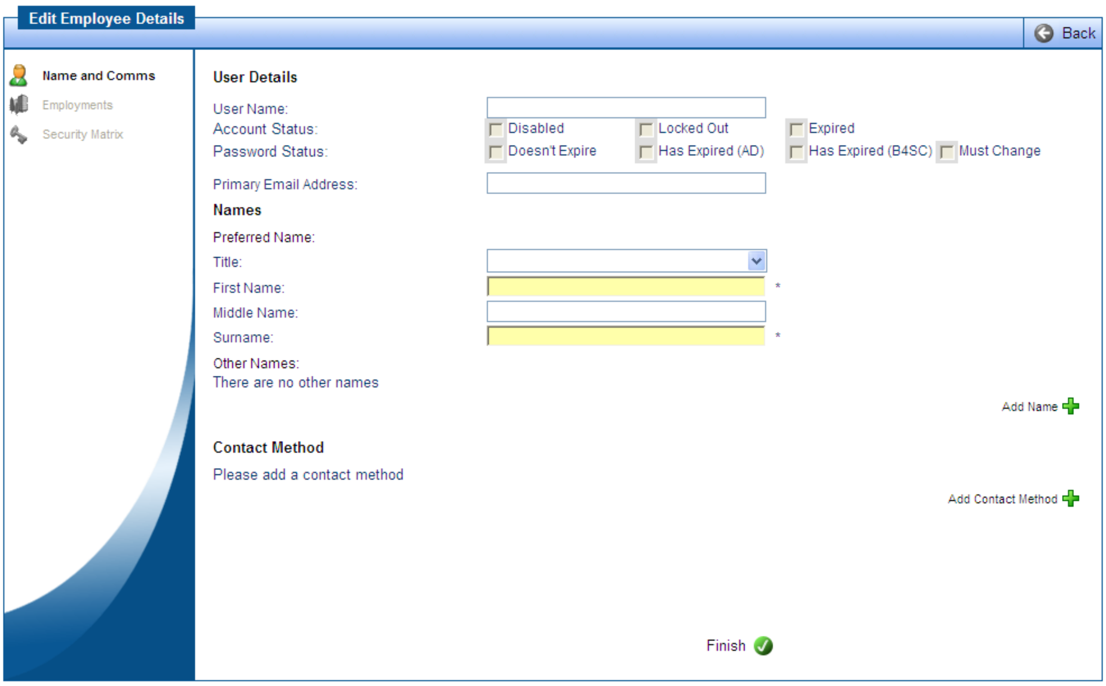


Figure 63 Employee Details Screen - New

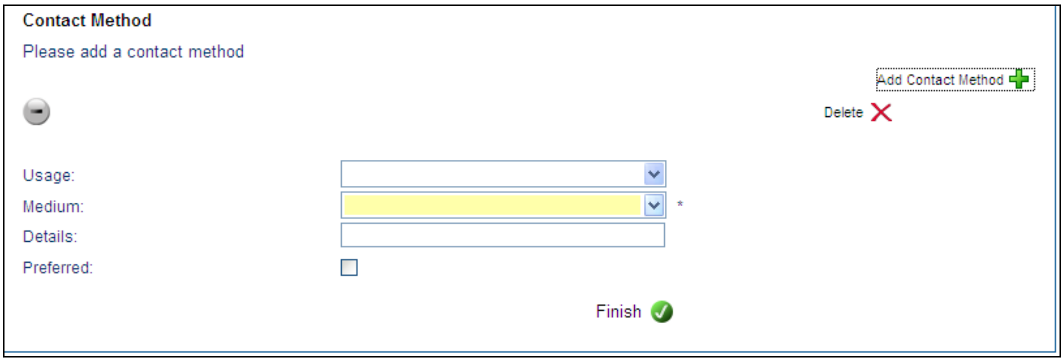
5. **Enter** the new user's **User Name.**

   The User Name is the first character of their first name, followed by their full surname. Eg: jsmith.

6. **Enter** the new user's First Name and their Surname into the appropriate boxes.

> **Important**
>
> **The username format is first name initial, followed by full surname (no spaces). For example, Jo Smith would have the username jsmith. If there are multiple people with the same initial surname combinations, add a sequential number to their user name. For hyphenated surnames, or surnames with a space, remove the hyphen and/or space (e.g. Jo Smith-Jones = JSmithjones; Fred St Joseph = FStjoseph)**
>
> **Username is <u>not</u> case sensitive**
>
> **Password <u>is</u> case sensitive**

7. Click the **Add Contact Method** link (Add Contact Method ✚) to add contact details. A contact phone number <u>must</u> be added.



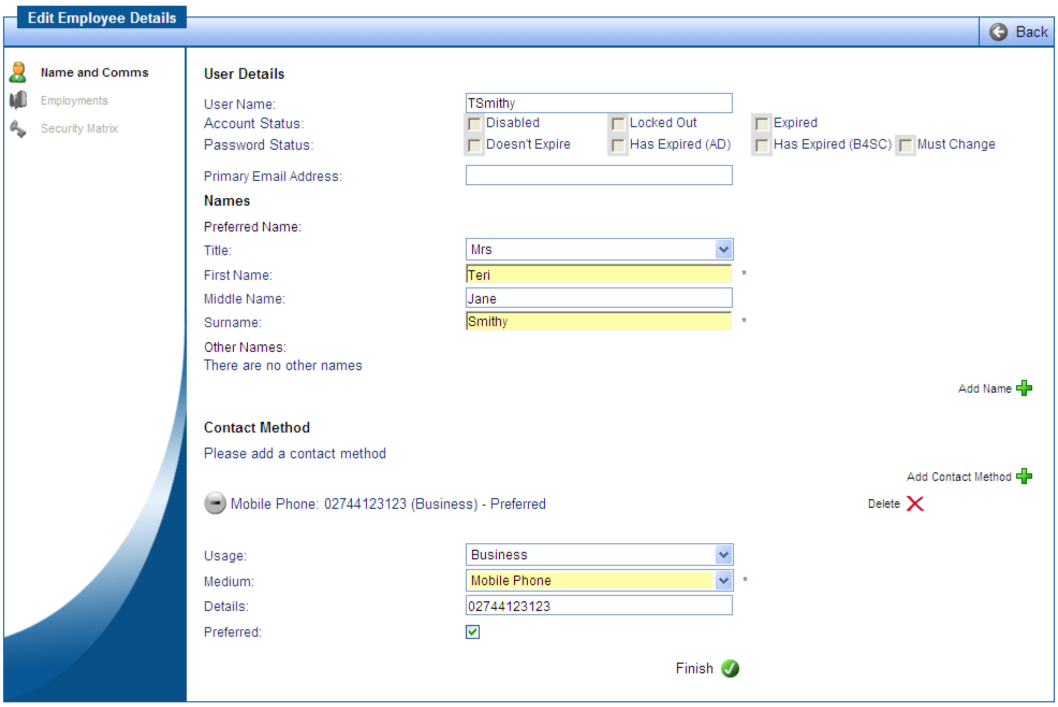


Figure 64 Employee Details Screen - Completed

8. Click the **Finish** (Finish ✓) button, at the bottom of the screen, once all details are added. The **Employment screen** will be displayed. If you are logged in as a DHB you will see this screen below, and are able to allocate as appropriate.

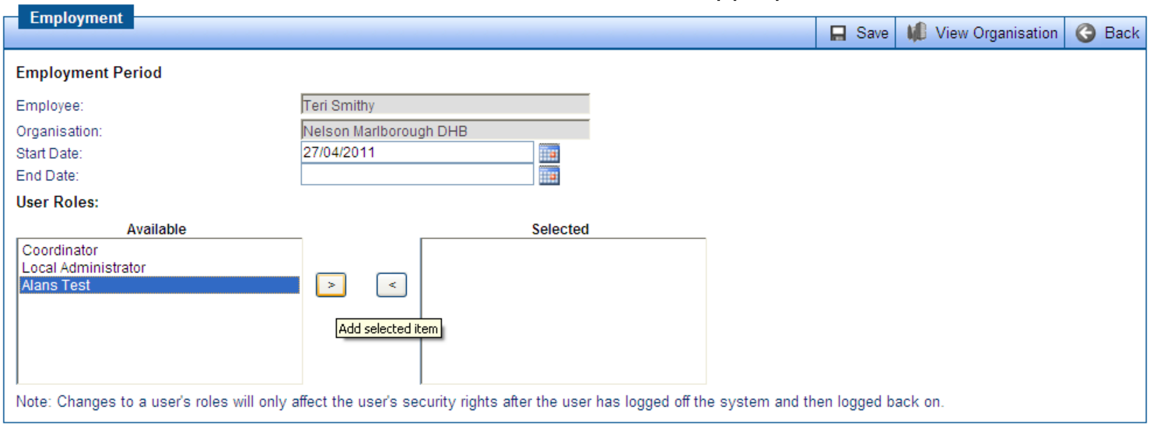


Figure 65 Employment Screen- DHB

9. If you are logged in under a provider organisation you will see the screen below and are able to allocate as appropriate.

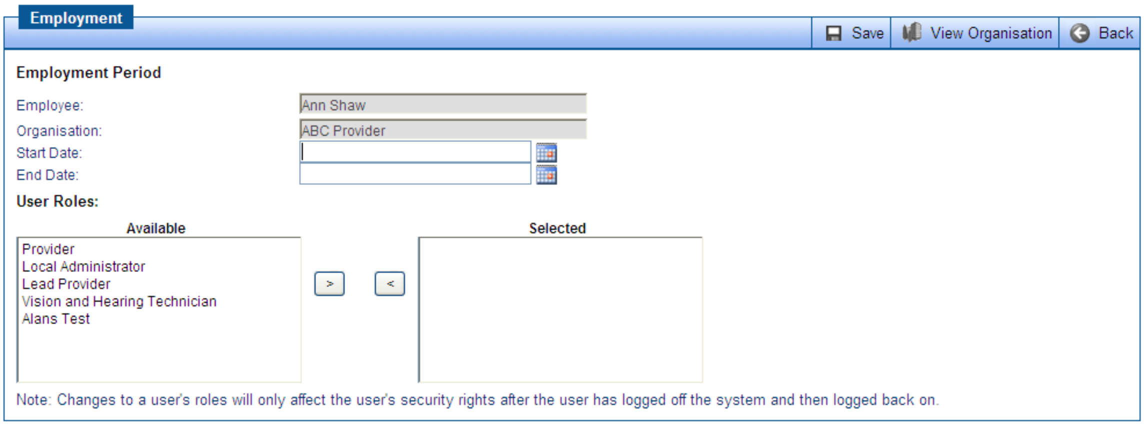


Figure 66 Employment Screen- Provider

10. Add a **Start Date** and if appropriate an **End Date**.

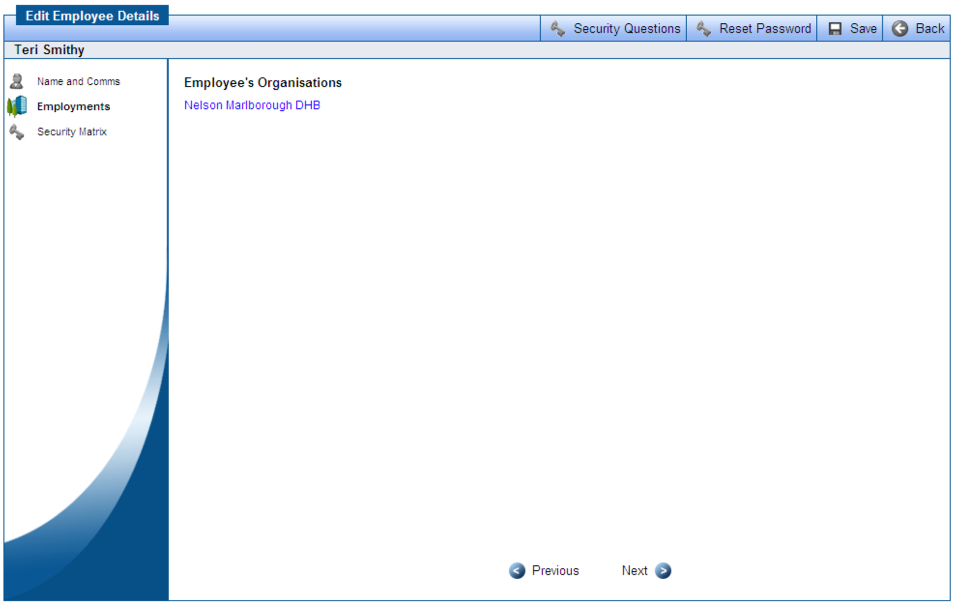
11. Select the appropriate **Role**, from the Available list, and press the > button to assign the role to the user.

For further information on Users of the System see Users of the System and their Roles on Page 4, and User types and roles on Page 88.

12. Click the **Save** button (

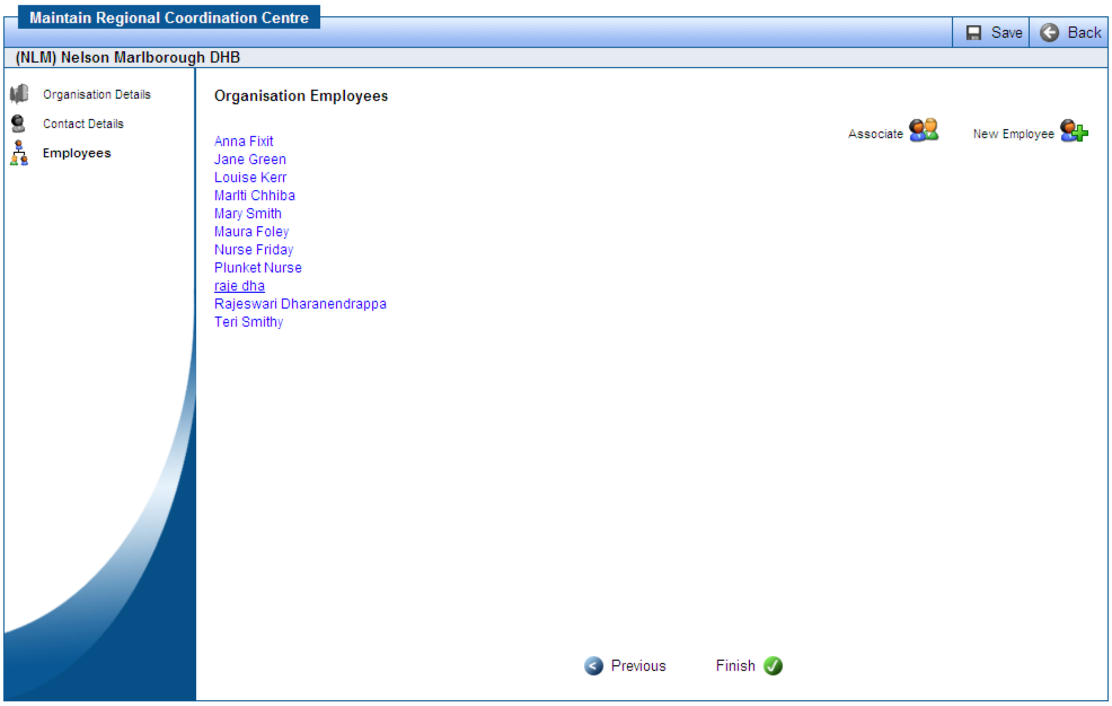
) in the menu bar at the top of the screen, once changes have been made. The **Edit Employee Details** screen will be displayed.

This will list all organisations the user is linked to.

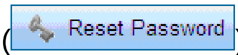


13. Click the **Save** button (

) again. This will display the **Maintain Regional Coordination Centre/Organisation Employees** screen with the new user added to the Organisation.



14. New users require their password to be set for first time usage. **Click** the new user's **name**.

15. Click the **Reset Password** button at the top of the screen (

). The Reset Password screen will be displayed.

The username field will be automatically populated with the user's login id.

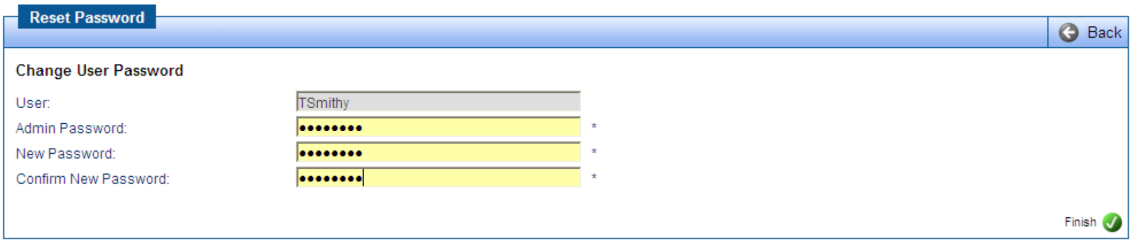
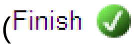


Figure 67 Change Password Screen

16. Enter **your** password in the **Admin Password** field

17. Enter the **new password** of Passw0rd (upper case P and numeric zero) in both the New Password and Confirm New Password fields.

18. Click the **Finish** button (

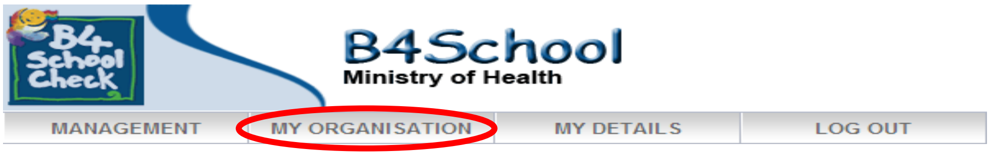
).

19. Provide Username and Password to the user..

23.2 Assigning Existing user to multiple organisations

Users may be employed by multiple organisations. The B4SC IS allows representation of users employed by multiple organisations, by way of association. Do this by opening an organisation, and associate a new user/employee with it. This needs to be done for each organisation the user is employed by.

1. Log into the B4SC IS with a user ID that has administration rights for the organisation (i.e. can add employees for their organisation).
2. Click the **My Organisation** tab.



3. The following Maintain My Organisation (Organisation Details) screen will be displayed:

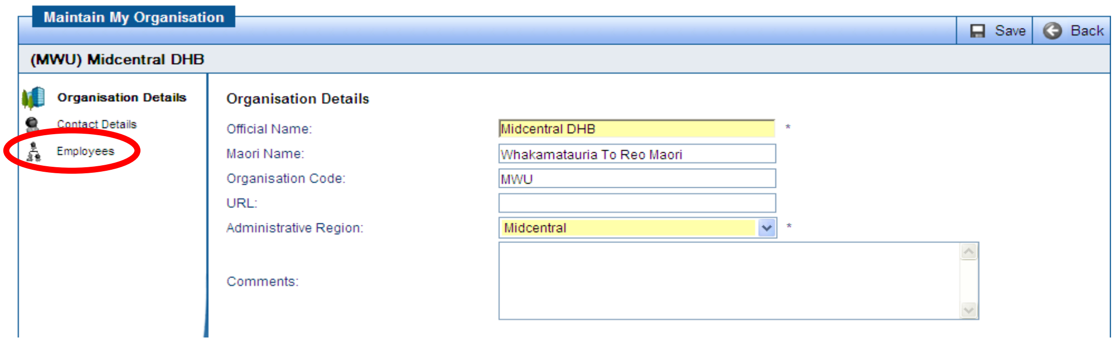
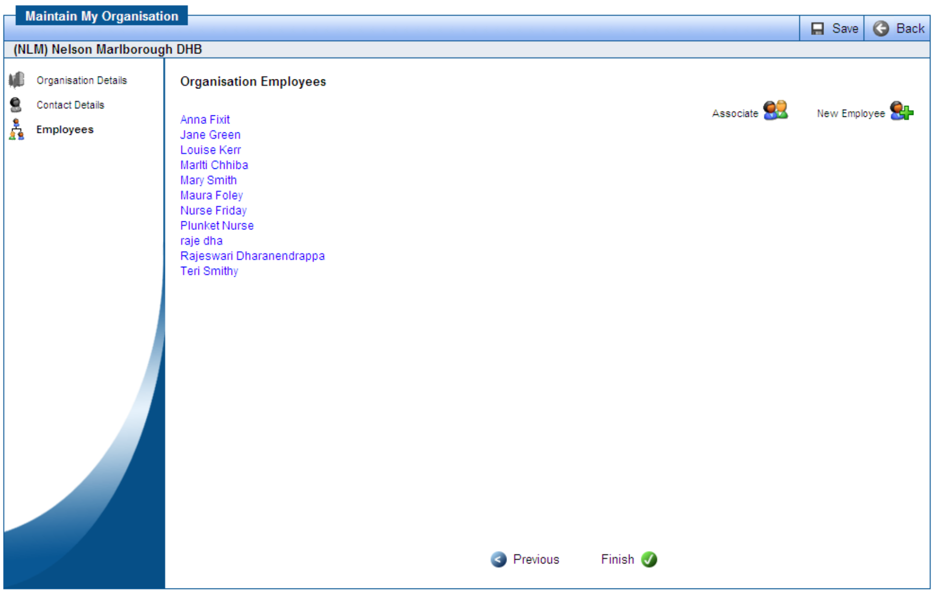
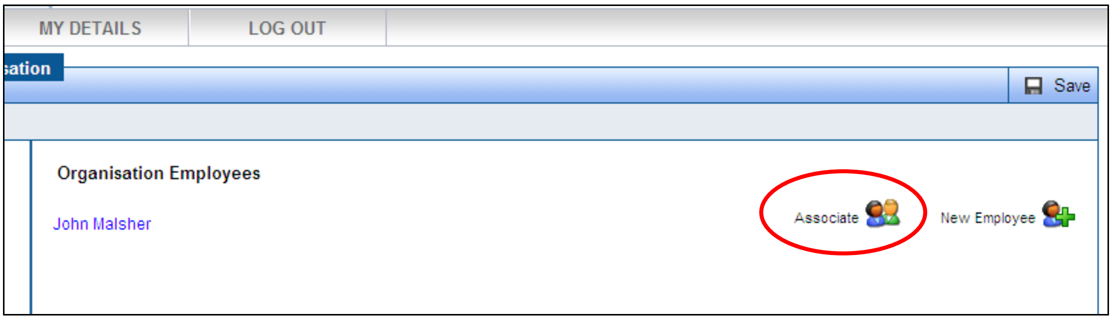


Figure 68 Organisation Details Screen

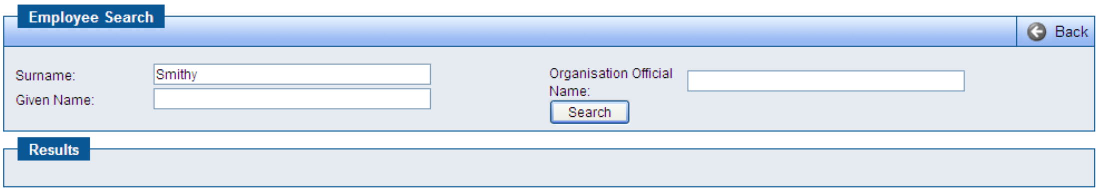
4. In the left hand panel, click the **Employees link** () for a list of current employees.



5. If the user is already setup on the system for another organisation, Click the **Associate** link (Associate) to link an existing user to an organisation.



6. This will open a search screen.



7. **Search** for the user to be associated with the organisation by entering search criteria Surname or Given Name and click **Search** button (or hit Enter).

Tip

The wild card character % can be used to help find the user. Refer to the "Use of wild card character when exact spelling not known" subsection of the "Search" section earlier in this document.

In the following example, User2 will be associated with the Waiora PHO organisation (which is the organisation the administration user chose when they logged in). Multiple user names are listed because the wild card character % has been used, and searches only require the first two or more characters for text fields. The search results show the organisations the searched users are associated with.

8. If the user is not on the list, ensure that you have spelt their name correctly, if they still don't appear, follow the instructions for Create a new user on Page 96.

9. Select the relevant user from the list provided by clicking the **Select** link (Select) next to the user's name..

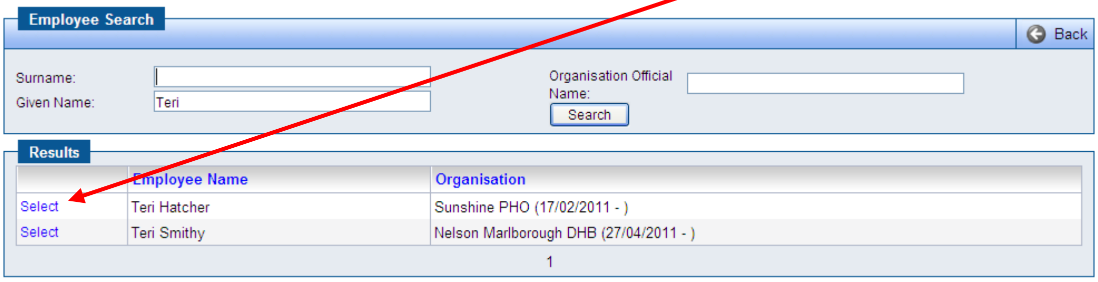


Figure 69 Employee Search Screen

10. This will open the **Employment** screen. **Employee** and **Organisation** should already be populated for you.

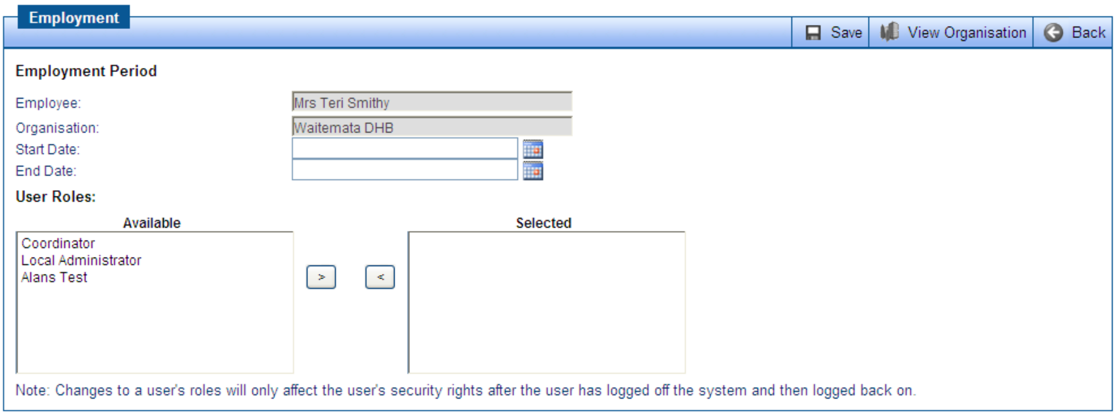


Figure 70 Employment Period Screen

11. Add a **Start Date** for this employment period and if appropriate an end date (click calendar icon).

12. Select the appropriate **Roles** from the Available panel, and click the > button to assign the functionality to the new user, for this organisation.

Tip

A user can have a mix of roles for different organisations. For example, they can be a Provider at one organisation, and a Local Administrator and Provider at another.

13. Click **Save** (Save), in the menu bar at the top of the screen, when finished. The **Edit Employee Details** screen will be displayed, and will show the associated user's original organisations, plus the administrator's organisation.

In the following screen example, Teri Smithy was originally associated with Nelson Marlborough DHB, and now shows Teri Smithy's new association with Waitemata DHB.

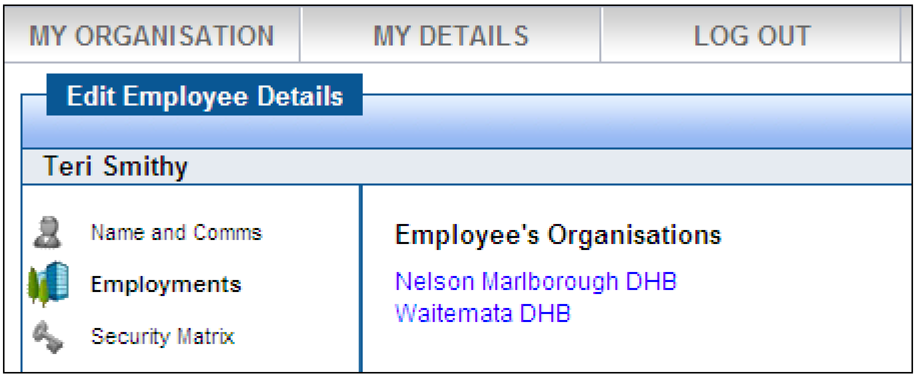


Figure 71 Employments Screen

14. To continue with the administrator's normal work, click the Management, Allocation, My Organisation, My Details, or Log Out tabs.

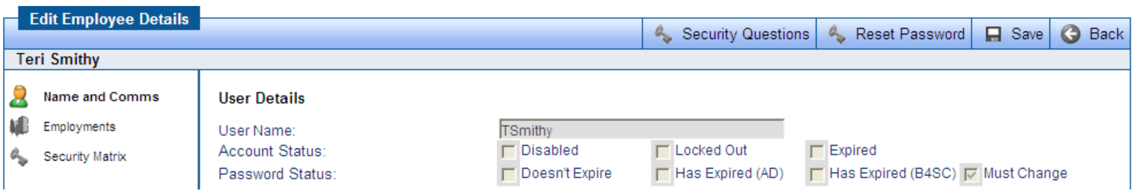
23.3 To remove an active association of an employee from an organisation

1. Log into the organisation

2. Click the **My Organisation** tab

3. Click the **Employees** link (Employees)

4. Select the **Employee**, and set their **Account Status** to disabled



5. Click the **Save** button (Save)

24 GLOSSARY

For a directory of health topics (not only B4 School Check): www.moh.govt.nz/healthtopics

B4 School Check	A nationwide programme offering a free health and development check for four year olds. Introduced during 2008. B4 School Check is part of the Well Child Tamariki Ora service. www.moh.govt.nz/b4schoolcheck Also included is a handbook that guides clinicians through the standard protocols for each component of the B4 School Check. www.moh.govt.nz/moh.nsf/indexmh/b4-school-check-handbook-mar2010 See also Well Child/Tamariki Ora Framework
B4 School Check Information System.	A national system that captures and stores data relating to the child, permission, checks (height, weight, hearing, vision, development and behaviour assessments), and any issues identified and referrals made. The overall purpose of the B4SC IS is to track improved health outcomes from the B4 School Check, to improve child health and education outcomes and reduce inequalities.
B4SC	B4 School Check
B4SC Coordinator	Refer "Users of the system, and their roles" section of this document.
B4SC IS	Refer B4 School Check Information System.
Caregiver	A person who provides direct care (as for children, elderly people, or the chronically ill)
Central Administrator	Refer "Users of the system, and their roles" section of this document.
Centralised service model	Refer "Centralised versus Distributed service models" subsection within the "Coordinator and Lead Provider Function" section of this document.
CHQ	Child Health Questionnaire
Deprivation Quintile	Socio-economic scale, divided into fifths, to divide areas according to some measure of deprivation. "1" is the least deprived (richer), and "5" is the post deprived (poorer). The scale can be used to analyse variations in health between deprived and affluent sections of the population regardless of where they live. Deprivation quintile within the child summary page is a read only field. Only change of address can alter this field.
DHB	District Health Board

Distributed service model	Refer "Centralised versus Distributed service models" subsection within the "Coordinator and Lead Provider Function" section of this document.
ECE	Early Childhood Education
Lead Provider	Refer "Users of the system, and their roles" section of this document.
Lift the Lip	A quick and easy technique for screening infants' and toddlers' teeth for dental caries (tooth decay). The technique can be learned quickly and easily by non oral-health professionals, including parents and caregivers, so that infants and toddlers with early and active dental caries can be referred for management to oral health services. www.moh.govt.nz/moh.nsf/pagesmh/7385/$File/early-childhood-oral-health-a-toolkit-feb08.doc
Local Administrator	Refer "Users of the system, and their roles" section of this document.
National Coordinator	Refer "Users of the system, and their roles" section of this document.
National Health Committee	An independent statutory committee established under Section 13 of the Public Health and Disability Act 2000, which reports to the Minister of Health on many health and disability issues. The committee formulates advice on public health and public health matters, in consultation with the public sector, health service providers, and the community. It publishes an annual report to the Minister which is tabled in Parliament. www.nhc.health.govt.nz/moh.nsf/indexcm/nhc-aboutus-home
NHI number	A unique identifier that is assigned to every person who uses health and disability support services in NZ. NHI numbers are stored on the National Health Index (NHI), along with demographic details. The NHI and associated NHI numbers are used to help with the planning, co-ordination and provision of health and disability support services across NZ. www.nzhis.govt.nz/moh.nsf/indexns/nhi
NIR	National Immunisation Register
IS	Refer B4 School Check Information System.
PDF	Portable Document Format. A format for capturing and viewing information, from almost any application, on any computer system, and share it with virtually anyone, anywhere. Enables the viewing of a document as if it was printed. PDF documents can be created by installing a PDF printer driver.
PEDS	Parental Evaluation of Developmental Status
PHO	Primary Health Organisation

Primary Health Organisation	Provide essential primary health care services by bringing together doctors, nurses and other health professionals (such as Māori health workers, health promotion workers, dieticians, pharmacists, physiotherapists, psychologists and midwives) in the community to serve the health needs of their enrolled populations. PHOs vary widely in size and structure, are not-for-profit, and provide services either directly by employing staff or through provider members. www.moh.govt.nz/moh.nsf/indexmh/phcs-pho
Prosocial	Government provides or funds a range of universal services to support 'pro-social' development, including ante-natal and infant healthcare services, childcare and early childhood education, and primary and secondary schooling. A small percentage of children and young people have behavioural difficulties that require more intensive and specialist support than can be provided by parents or teachers alone. This Plan will improve the specialist support to those children and young people. A Plan has been jointly developed by the Ministries of Social Development, Health and Education with support from the Ministry of Justice. It includes a framework for expanding and re-designing some existing specialist behavioural services, as well as measures to support better co-ordinated services and evidence-based decision-making in the longer term. www.moh.govt.nz/moh.nsf/indexmh/interagency-plan-conduct-disorder-antisocial-behaviour-2007-2012?Open In the B4SC IS, the prosocial scale is scored so that an absence of prosocial behaviour scores low. A child may still have difficulties, but if they have a high prosocial score, the outlook for intervention is better than if they have a low score.
Provider	Refer "Users of the system, and their roles" section of this document.
SDQ	Strengths and Difficulties Questionnaire
Tamariki Ora	Refer Well Child/Tamariki Ora Framework
VHT	Vision Hearing Technician
Vision and Hearing Technician	Refer "Users of the system, and their roles" section of this document.
Well Child/Tamariki Ora Framework	Support for families/whānau to maximise their child's developmental potential and health status. The framework covers screening, education and support services, and is offered free to all NZ children from birth to five years. www.moh.govt.nz/wellchild See also B4 School Check

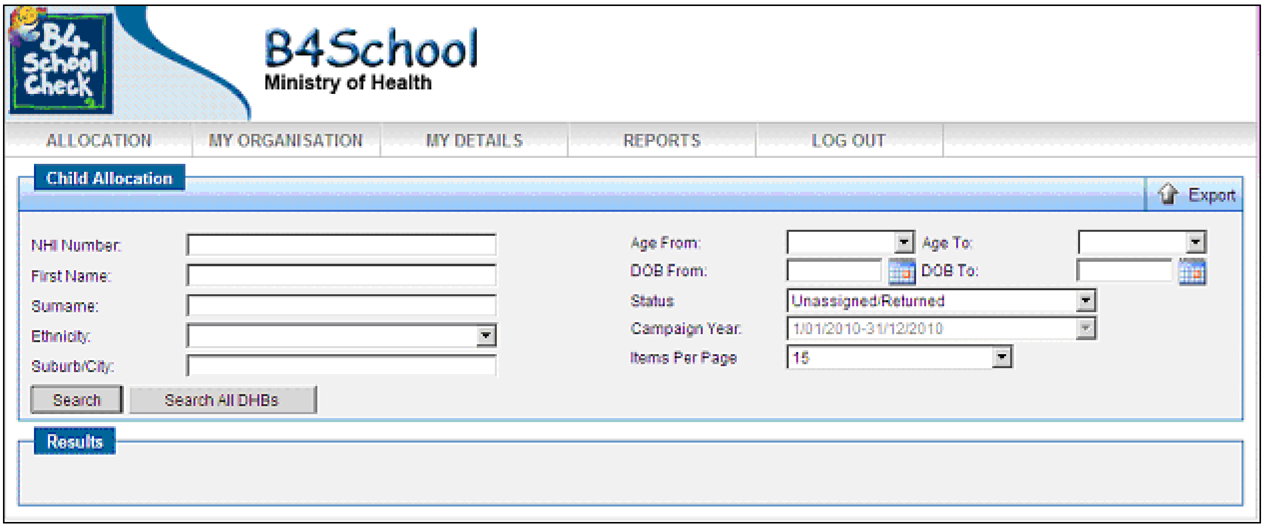
Wild card character (%)	A character used in text field searches, to replace one or more unknown characters (e.g. search criteria s%t%h will find all names starting with "s", and that contain a "t" and an "h" in that order (e.g. "Smith", "Stephenson", "St Joseph"). Refer "Use of wild card character when exact spelling not known" section of this document.
XML	Extensible Mark-up Language. Is a set of rules for encoding documents in machine-readable form. XML schemas are used to convert a document or data into the machine readable form, and then convert back into human readable form for recipient use. There are many types of XML schemas, and the same one must be used to convert a machine readable XML file into a human readable file. XML and XML schemas operate "behind the scenes".

APPENDIX A

25 NAVIGATING THE SCREENS

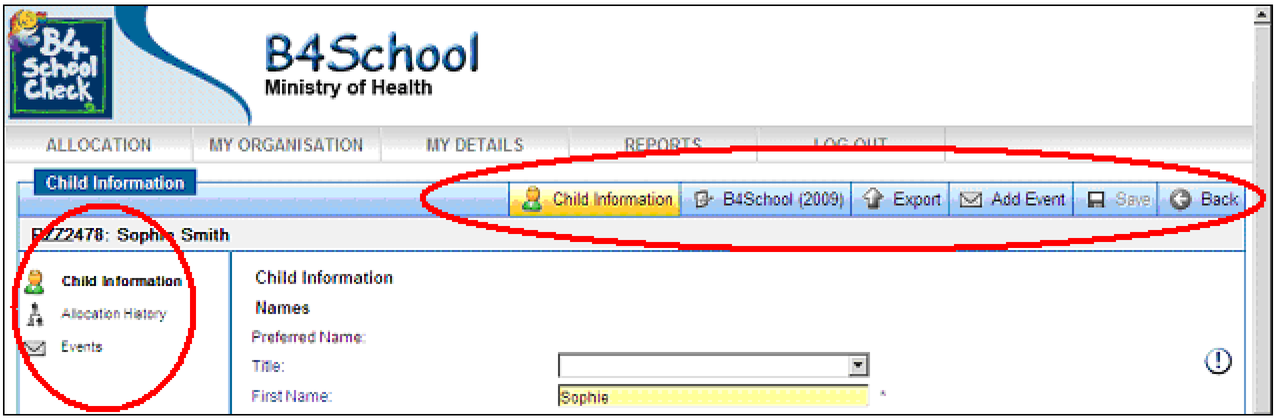
25.1 Mouse and keyboard

After logging in, a screen similar to the following will appear



The B4SC IS web application provides a navigation bar across the top of the “work area” (below the B4 School Check logo). The example above shows buttons for **Allocation** (this may show **Management**), My Organisation, My Details, Reports, Log Out.

Once in a child information screen, a second set of navigation buttons and links, relating to information about the child, appears on the left of the screen, and along the top (circled in the diagram below).

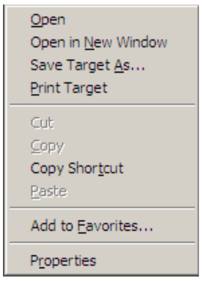
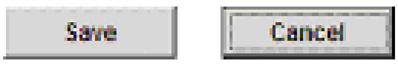
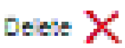


Use the mouse to click to activate any screen object (e.g. link, button, or to select a text field).

25.2 Navigating using the keyboard

Most buttons, links, and fields can be scrolled through using the Tab key. To navigate backwards through the buttons, links, and fields, hold down Shift while pressing the Tab key

Once a button, link, or field is selected, use one of the following keys to activate the button/link (some practice may be required to get use to the activation methods):

Button or link	**Activation key(s)**
"Flat" buttons  or 	Tab to button. Sometimes Enter will work, or Press keyboard context menu button  to open the following menu . Press the [Down Arrow] key once, to highlight the "Open" option, and then Enter.
"3D" buttons 	Tab to button. Press [Space Bar] to activate.
Links  ,  or 	Tab to the link and press Enter.
Items in a drop list 	Tab to the field, press [Up or Down arrow] to scroll through the items in the field. To expand the drop list to see all the items: Tab to the field, then press Alt + [Down arrow] key to see the drop list items. Use the [Page Up/Page Down] and [Up/Down arrow] keys to select an entry. Press Enter to input the highlighted drop list item, or press Esc to escape. Tab to the next field.

Button or link	Activation key(s)
Select a date from the calendar icon	Tab to the icon and press Enter or [Space Bar]. Press the [Up/Down/Left/Right arrow] keys to select a date. To select another month, press the [Up/Down] arrow keys repeatedly. Press Enter to input the highlighted date, or press Esc to escape. Tab to the next field.
Select an item from a group of buttons Female Male Unknown	Tab to the group Press [Left/Right arrow] keys to highlight desired item. Tab to the next field.

Notes and other keyboard options:

Some buttons/links (e.g.) may not be accessible using the keyboard. Use the mouse to select these. Note: The button does not have any functionality when clicked with the mouse. This button provides information when the mouse hovers over it.

To move to the top of the screen, press **Tab** repeatedly to scroll through the fields until the top of the screen is reached (or **Shift + Tab** to move backwards through the fields). There is no keyboard combination that will directly select the top of the screen. In many cases, pressing Shift + Tab (or using the mouse) will be the quickest method to select the top of the screen.

To scroll up and down through the screen, tab to any item that is not a text field (e.g. a link, calendar icon, or button). Alternatively, mouse click on any part of the browser screen other than a text field. Use the [Page Up/Down, or Up/Down arrow] keys to scroll up and down the screen. If there is a horizontal scroll bar, use the [Left/Right arrow] keys to scroll left and right.

To return to the previous screen, tab to any item that is not a text field (e.g. a link, calendar icon, or button). Alternatively, mouse click on any part of the browser screen other than a text field. Press the Backspace button to go back a screen (a warning message may appear to say that data will be lost). To move forward to a screen that has already been viewed, press **Shift + Backspace**. These are the same as using the forward and back buttons on the browser.

To view the B4 School Check screen in full screen mode (to view more information on screen at once), press **F11**. To return to normal view mode, press F11 again.

APPENDIX B

26 QUICK REFERENCE GUIDES

User login

1. Go to Web link:
   http://10.247.236.25/WebPages/Login.aspx (Production site)
   http://10.247.236.20/WebPages/Login.aspx (Training site)
2. Enter user name and password
3. Select organisation (B4SC Coordinator can advise which to use)
4. Click OK

Search

1. Enter search criteria (can use wild card character %)
2. Select Search to search within the organisation selected at login time, or select "Search All DHBs" to search nationwide.
3. Click column headings repeatedly to sort results in ascending or descending order

Manually adding a child

1. Search for child to ensure he/she is not already in the system. Use % to check for misspellings.
2. Obtain an NHI number (NHI Call Centre 0800 855 151. Have your Provider ID ready. To obtain a Provider ID, call MOH Sector Services 0800 281 222, option 4 and 1)
3. Click the "Search All DHBs" button.
4. Click the "New Child" button.
5. Enter child details (yellow fields with asterisks are mandatory)
6. Click Save

Editing child details

1. Search for the child
2. Click the child's name in the search results (Child Information screen will display)
3. Edit details as necessary
4. Click Save

Reporting and data exporting

Child Summary Report

1. Search for the child
2. Click the child's name in the search results (Child Information screen will display)
3. Click the "B4School (YYYY)" tab, or Overview link (left panel). The overview screen will display)
4. Click the Child Summary link in top right corner of screen

To export data...

1. Select an output option.
2. Click the Export link. This will open a dialog box.
3. Click Save. This will open another dialog box.
4. Select a location.
5. Click Save.

Export a child record

1. Enter search criteria for records to be exported
2. Click Search or "Search All DHBs"
3. Click the Export button/link (top right corner of search criteria section)
4. Select export type (partial child details, or full details including assessments)
5. Click the Export button. This will open a dialog box
6. Click Save (or Open to view resulting file and save at a later time). This will open a dialog box.
7. Select a save location
8. Click Save. File will be saved with an XML extension.
9. In explorer, locate the downloaded file.
10. Right mouse click the file, and select "Open with Excel" (must be Excel 2003 or later)
11. Save As the file in XLS format

Standard data extracts for downloading

1. Login as a coordinator. This will allow the Reports tab to be visible
2. Click the Reports tab
3. Click Exports, then the export file to be downloaded
4. Follow prompts to open or save file.
5. If saving, select a save location and click Save
6. Open/view file using Excel.

Coordinator and lead provider function – Allocate child to a provider

1. Login as a Coordinator, to view the “Child Allocation” search pane.
2. Search for a child or group of children
3. Select child or children to be allocated to a provider

   Assign a single child by clicking the “Assign Provider” link next to a child

   or

   Assign multiple children by clicking the check box next to all the children to be allocated (or click the check box in the column heading to select/deselect all children in the search results).
4. Click the “Assign Provider” link on any of the selected children.
5. Search for, and select, the provider to assign the child/children to. The child/children is/are now assigned.

Coordinator and lead provider function – Reassign child to a provider

1. Login as a Coordinator, to view the “Child Allocation” search pane.
2. Search for a child (set the Status criteria to Assigned).
3. Click the “Reallocate Icon” to the left of the child’s name in the search results
4. Search for, and select, the new provider to assign the child to. The child is now reassigned.

Provider function – Add caregiver information

1. Search for child.
2. Click child’s name. This will open the Child Information screen.
3. Click the “Add Caregiver” link (may need to scroll down)
4. Enter caregiver details (yellow fields with asterisks are mandatory)
5. Click Save

Provider function – Load consent details

1. Search for child.
2. Click child's name. This will open the Child Information screen.
3. Ensure Caregivers Details have been entered
4. Click the "B4School (YYYY)" tab (this will only appear if the child has been assigned to a provider). The Overview screen will be displayed.
5. Click the "Download Consent Form" link
6. Fill in the consent form. Scan it to a PDF (or embed an image of the signed form in another document, such as Word or Excel.
7. Complete the consent related information no the Overview screen (if consent given, type of consent, etc).
8. Click the "Click here to upload document" link to upload the scanned signed consent form.
9. Click Save. Checks can now be added.

Provider function – Child Health Questionnaire (CHQ)

1. Search for, and select a child.
2. Click the "B4School (YYYY)" tab. This will open the Overview screen.
3. Click the Add New link to the right of the Child Health Questionnaire heading.
4. Complete the Child Health Questionnaire screen.
5. Add events, siblings, pre-conditions, medications, and referrals, as necessary.
6. Select an outcome.
7. Click Save.

Provider function – Dental check

1. Search for, and select a child.
2. Click the "B4School (YYYY)" tab. This will open the Overview screen.
3. Click the Add New link to the right of the Dental heading.
4. Complete the Dental Check screen.
5. Add events and referrals as necessary.
6. Select an outcome.
7. Click Save.

Provider function – Growth check

1. Search for, and select a child.
2. Click the "B4School (YYYY)" tab. This will open the Overview screen.
3. Click the Add New link to the right of the Growth heading.
4. Complete the Growth Check screen.
5. Add events and referrals as necessary.
6. Select an outcome.
7. Click Save.

Provider function – Immunisation check

1. Search for, and select a child.
2. Click the "B4School (YYYY)" tab. This will open the Overview screen.
3. Click the Add New link to the right of the Immunisation heading.
4. Complete the Immunisation Check screen.
5. Add events and referrals as necessary.
6. Select an outcome.
7. Click Save.

Provider function – Parental Evaluation of Development Status (PEDS)

1. Search for, and select a child.
2. Click the "B4School (YYYY)" tab. This will open the Overview screen.
3. Click the Add New link to the right of the PEDS heading. This will open the PED Questionnaire screen.
4. Click the "Download PEDS form" link to download the PED Questionnaire (the form is also available from appendices in the handbook for practitioners).
5. Complete the paper questionnaire. The "B4SC: A Handbook for Practitioners" has appendices (7, 8, & 9) for assisting with this questionnaire.
6. Complete the PED Questionnaire screen (transfer details from the paper questionnaire).
7. Add events and referrals as necessary
8. Select an outcome.
9. Click Save.

Provider function – Strengths and Difficulties Questionnaire (SDQ)

Two questionnaires – one for parent SDQ-P/caregiver SDQ-T, and one for child's teacher. Questions on the two forms are the same.

1. Search for, and select a child.
2. Click the "B4School (YYYY)" tab. This will open the Overview screen.
3. Click the Add New link to the right of the SDQ Parent heading. This will open the Strengths and Difficulties Questionnaire screen (for parents/caregivers).
4. Click the "Download Parent form" link to download the SDQ Parent Questionnaire.
5. Complete the paper parent questionnaire.
6. Complete the SDQ Parent Questionnaire screen (transfer details from the paper questionnaire).
7. Click the "Calculate Scores" button (to automatically fill in the six scores fields).
8. Add events and referrals as necessary
9. Select an outcome.
10. Click Save.
11. Repeat the above steps for the SDQ Teacher questionnaire.

Provider function – Vision and Hearing screening

1. Search for, and select a child.
2. Click the "B4School (YYYY)" tab. This will open the Overview screen.
3. Add the Vision and Hearing Technician's name
4. Click the "Consent Implied" check box.

   This indicates the correct process has been followed to inform the caregiver that the check would be done and that the results will be stored in the information system. The Coordinator will have managed the process of getting the correct wording to each Early Childhood Education Centre to ensure this process is followed.
5. Set the "Date Consent Implied" to the date the check was performed, unless there is a specific known date when the consent was obtained from the caregiver.
6. Click Save
7. Click the Add New link to the right of the **Hearing** heading (Overview screen).
8. Complete the Hearing Check screen.
9. Add events and referrals as necessary
10. Select an outcome, Click Save.
11. Click the Add New link to the right of the **Vision** heading (Overview screen).
12. Complete the Vision Check screen.
13. Add events and referrals as necessary
14. Select an outcome, Click Save.

Add provider notes against a child record

1. Search for, and select a child.
2. Click the “B4School (YYYY)” tab. This will open the Overview screen.
3. Click the “Provider Notes” link (left panel)
4. Add either a standard note or an urgent note (different panels).
5. Click Save

Uploading documents against a child record

1. Search for, and select a child.
2. Click the “B4School (YYYY)” tab. This will open the Overview screen.
3. Click the Documents link (left panel)
4. Click the “Click here to upload document” link.
5. Follow prompts to upload document.
6. Add comment as necessary.

Assigning provider access rights to specific child records

1. Search for, and select a child.
2. Click the “B4School (YYYY)” tab. This will open the Overview screen.
3. Click the “Access Rights” link (left panel)
4. Select a provider/employee to allow access to, along with the type of access they can have (read only or read/write).
5. Click the “Grant Permission” link (below the Access Type selection heading)

Close a child’s check record

A child’s check record can only be closed when:

- All checks, including any follow up checks have been completed and
- All referrals have been completed.

1. Search for, and select a child.
2. Click the “B4School (YYYY)” tab. This will open the Overview screen.
3. Scroll to the bottom of the Overview screen
4. Click the 2 check boxes (immediately above the Save and Cancel buttons).

   Note: These check boxes will only be accessible once all the referrals are completed and all checks are either completed or declined.
5. Add any notes relating to the closure (or any other aspect of the checks), Click Save.
6. The status of the checks will show as Closed. The System will remove the child from the Provider’s allocated child list.